

TRUSTEES ANNUAL REPORT



YEAR END
JULY 2019



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ADMINISTRATIVE DETAILS

Registered Charity Name

CIO Number

Date Registered

Registered Office

Rooted In

1184481

18 July 2019

Weymouth Centre

2A Weymouth Avenue

Allerton, Bradford

BD15 7JJ

Trustees

Chairman

Secretary

Treasurer

Dean Naidoo

Kathryn Marsden

Rob Atkin

Lucy Atkin

Pamela Kershaw

Independent Examiner

Torvell Dent Chartered Accountants

Centre of Excellence, Hope Park

Trevor Foster Way

Bradford

BD5 8HH

Bankers

Lloyds TSB

45 Hustlergate

Bradford

BD1 1NT

ROOTED IN SUMMARY

During this year Rooted In made the transition from an Unincorporated Charity (registered under charity number 1126786) over to a Charitable Incorporated Organisation (CIO number 1184481). Whilst doing this we have separated off The Sugar Snap Kitchen into a wholly owned subsidiary Company Limited by Shares (Company No. 11101294) with all shares owned by Rooted In. This move was agreed by the trustees to enable the charity to take further growth steps in accordance with our strategic plan.

The work and activity we see today of Rooted In is the culmination of 16 years of grassroots, volunteer-led and community focused vision. Initially started as a once a week children's outreach project as part of a local church pioneered by our founder Janet Nicholson, today we are a fully independent organisation building on the original vision to see our whole community transformed from within, person by person, family by family, one street at a time.

The financial climate for the charity has been similar to most other comparable small and local charities. Available funds have yet again decreased with major funders drastically reducing the scope and scale of their grant giving. Rooted In has had to make use of our reserves along with other significant cost cutting measures including partial wages. This has required an increased level of ingenuity, creativity and commitment from the staff team.

The trustees are incredibly proud and grateful to the staff team for adapting to change so well whilst facing limited financial security. The trustees would also like to recognise the groundswell of local volunteer involvement within the charity. Many have stepped into new roles, taken responsibility and brought new ideas that have been pivotal to the organisations re-invention and new direction. And lastly, the trustees would like to extend their gratitude to the wide range of individuals, companies and trusts that have taken the time to listen to our vision, see the difference we make and invest their finance's, people and skills. The success we see is a direct result of these three groups coming together around one central purpose and playing their unique part.

CORE VALUES & STRATEGY

Rooted In is to be known not just for what we do, but how we do it.

We are committed to collaborating with the community, listening to their voice and creating a culture which encourages local social responsibility to deliver grassroots transformation.

This approach and the organisations significant professional experience in community leadership, compliance and policies, social enterprise and project development and accountancy paired with our long-standing involvement in the community means that we are the right people to spearhead such a significant movement.

At Rooted In, our approach of building people creates an inner strength and resilience which empowers all ages to make more positive and constructive choices, rather than building a team and services that solely respond to crisis. To do this we have developed a new strategy, which is driven by our culture, purpose and beliefs.

This strategy ensures that all our programmes will be centred on developing and building people. As such we structure our team and work load to ensure each person can take responsibility for training and mentoring local volunteers. This strategy opens up the organisation to a wider range of opportunities that have never been available to most in our community. Whilst this approach may be slower and harder work, we believe it will have a much deeper and longer lasting impact on those in our community.



THREE

CORE VALUES & STRATEGY

WE BELIEVE

We believe in the people of our community and their inherent value. We believe they hold the key to their own success and future prosperity of our community

PURPOSE

RootedIn exists to empower people to reach their potential by equipping individuals from a foundation of love, to find and fulfil their purpose and contribution to the community

CULTURE

THINK BIG AND START SMALL – It's about courage to take big steps and wisdom to tie your shoelaces first
IT IS RIGHT TO HONOUR ONE ANOTHER – It's about being a community that's not shy to encourage one another
EVERYONE CAN BE A CONTRIBUTOR – It's about standing up and bringing others with you
WE THINK INSIDE THE BOX – It's about digging deep and finding the opportunities within
BE KNOWN FOR WHAT WE ARE FOR – It's about speaking up, being life and creating unity in a diverse community

STRATEGY

Our long-term approach to service development and delivery

CONNECT

Including as many people as possible through partnerships, promotion and outreach

STRENGTHEN FAMILY

Equip parents and carers with the skills to create a resilient family and a thriving home

BUILD COMMUNITY

Provide opportunities for individuals and families to come together, so reducing isolation and segregation whilst fostering healthy relationships

EQUIP TO ACHIEVE

Deliver training and skills development for adults enabling them to build a long-term self-supporting lifestyle

REINVEST

Community-led initiatives and enterprises that drive social change at a local level and generate profit for purpose

GROW BIG PEOPLE
Help each person uncover their identity, understand their value and discover their purpose

Successive generations of lives Rooted In Allerton, each one working out their purpose and committed to play their part in building community

STRUCTURE, GOVERNANCE & MANAGEMENT

Rooted In was formally established by a constitution dated 6 November 2008 as Kidz Klub Allerton and was subsequently registered as a charity on 19 November 2008. On 20 September 2019 Kidz Klub Allerton changed name to Rooted In. On 18th July 2019 Rooted In registered as a new Charitable Incorporated Organisation (CIO) with all assets transferred over. The CIO is managed by the Board of Trustees. Under the requirements of the constitution, in addition to the statutory powers of appointment, a new trustee may be appointed by a resolution of the trustees passed by a majority in a general meeting. Trustee training is carried out on an on-going basis making use of the Charity Commission website and other charity publications.

The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) 'Accounting and Reporting by Charities' issued in March 2005 in preparing the annual report and financial statements of the charity.

The trustees actively review the major risks which the charity faces on a regular basis together with controls over key financial systems. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces.

Objectives and Activities

Rooted In's principal objectives, as set out in the Constitution, are:

To act as a resource for people of all ages and backgrounds living in Allerton and neighbouring areas by providing advice and assistance and organising programmes of physical, educational and other activities as a means of:

- a) Advancing in life and helping by developing their skills, capacities and capabilities to enable them to participate in society as independent, mature and responsible individuals.
- b) Providing recreational and leisure time activity in the interests of social welfare for people living in the area of benefit who have need by reason of their youth, age, infirmity or disability, poverty or social and economic circumstances with a view to improving the conditions of life of such persons.

Our current and planned work supports children and young people, parents and families from Allerton and Lower Grange. Our aims fully reflect the purposes that the charity was set up, to benefit all children and young people regardless of personal background, faith, gender or personal circumstances.

SUMMARY OF ACTIVITIES

At the end of our previous year we set some ambitious goals, all of which we have met or made significant steps towards.

Rooted In Celebration

We hosted our first corporate fundraising evening. We chose to host the event in a local community centre, take on the planning ourselves as well as using our Sugar Snap Kitchen team to provide all the catering for the evening. Through the hosting of the event we managed to connect with a wider range of people than ever before, sharing the renewed vision and strategy of the organisation. We also used this opportunity to develop our base of regular givers and corporate partners.

The Sugar Snap Kitchen

After running The Sugar Snap Kitchen as an event catering business, this year we signed a lease to open our first permanent coffee shop venue. The Sugar Snap Kitchen at Hope Park Business Centre, replacing a Costa franchise. We opened for trading at the end of January and trading so far has picked up quicker than anticipated. We are currently providing five local parents with work experience, training or employment. We have already seen this venture start to invest surplus back into the charity.

The Sugar Snap Bakery

To support the rapidly increasing demands of the new coffee shop and to maintain good margins, we took the decision to launch 'The Sugar Snap Bakery'. Its purpose is two-fold, firstly to supply the highest quality fresh baked goods for the coffee shop. Secondly to support the social benefit of The Sugar Snap Kitchen by providing work experience, training and personal development for adults within our community. As we launched we quickly produced a solid range of produce, but more importantly we have developed a model of engaging and supporting those who are often classed as furthest from employment. Our support package helps identify and tackle the root causes that act as barriers to employment including mental health struggles, previous life trauma and lack of educational attainment.

SUMMARY OF ACTIVITIES

The Old Library

In September 2018 we were made aware of a prominent derelict former library building that had been bequeathed to the people of Allerton. It was held in trust by Bradford Council and was due for disposal by private auction. We put together an outline business case for returning the site for community use through Rooted In, re-developing the building or site to create office, youth and community activity space and a social enterprise training facility for The Sugar Snap Bakery. Whilst this project is still working through the legal process, and will require significant capital, we are encouraged by the ground swell of community interest and support for our idea to revitalise this derelict site as a landmark building for their benefit.

Rooted In Housing

In October 2018 we secured an initial seed fund to develop an alternative approach to locally accountable and locally rooted housing, through The National Community Land Trust Network. After their initial scoping report it was decided our idea had merit and further funding has been allocated for specific consultancy support to develop the idea and ready the organisation for the next steps. To date we have identified a piece of land at the heart of the community that was the site of a former Social Club and now has planning permission for 23 homes.



FUTURE PLANS

We believe the future success of the community lies within.

Over the coming year we still have to focus a significant amount of resource into creating a sustainable financial foundation for the organisation. To enable us to do this there will be further diversification in the services we provide and the social enterprises we operate. This will open up new funding streams and create new income channels.

Specifically we are looking to develop the following areas and projects:

- Establish formal community panels to push The Old Library development and Rooted In Housing forward.
- Systemise The Sugar Snap Kitchen Coffee Shop and The Sugar Snap Bakery to enable us to increase turnover, profit and number of people we can engage with our 'Growing Big People' support programme.
- Re-launch a fit-for-purpose children's and family outreach project with new community partners and volunteers.
- Allocate further time for external training for staff development to enable the project diversification.

The report was approved by the trustees on 6th April 2020.

Dean Naidoo - Chairman -



ACCOUNTS

RECEIPTS & PAYMENTS ACCOUNT FOR THE YEAR ENDED 31 JULY 2019

	Unrestricted Funds	Restricted Funds	2019	2018
Income				
Grants	-	55614	55614	126750
Dividends - The Sugar Snap Kitchen Ltd	8185	-	8185	-
Donations & Gift Aid	12847	-	12847	402
Income from charitable activities	4100	-	4100	11698
Income from other	-	180	180	4195
Total	25132	55794	80926	143045
Expenses				
Staff costs	24692	64407	89099	144093
Sessional workers	-	154	154	1152
Rent	690	4627	5317	10156
Training	-	-	-	2007
Computer & equipment	65	72	137	1403
Insurance	-	832	832	832
Telephone	149	174	323	439
Postage & stationery	450	931	1381	1172
Donations	300	-	300	300
Marketing & website	1	-	1	1008
Charitable activities	766	1528	2294	39829
Miscellaneous	185	258	443	230
Independent Examiner	600	-	600	525
Total	27898	72983	100881	203146
	(2766)	(17189)	(19955)	(60101)
Funds B/Fwd as at 31st July 2018	3490	41486	44976	105077
Transfer between Funds	-	-	-	-
Total Funds as at 31st July 2019	724	24297	25021	44976
Represented by:-				
Cash at Bank			24926	44880
Cash in hand			95	96
			25021	44976

ACCOUNTS

SCHEDULE OF RESTRICTED FUNDS FOR THE YEAR ENDED 31 JULY 2019

	Balance at 31st July 2018	Grants Received	Transfers	Expended	Balance at 31st July 2019
Sovereign Healthcare	2068	-	-	2068	-
Big Lottery- Awards For All	-	9961	-	9961	-
Bradford Youth Grant	-	900	-	900	-
Co-Operative Community Fund	-	10000	-	10000	-
Future Development Fund	5135	-	-	5135	-
Rooted In Reserves	8924	180	-	9104	-
St James Place	-	10000	-	7685	2315
Brelms Trust CIO	2184	4753	-	4956	1981
The Sobell Foundation	-	20000	-	-	20000
Garfield Weston	20000	-	-	20000	-
Pears	652	-	-	652	-
Provident Social Impact	2522	-	-	2522	-
	41485	55794	-	72983	24296

INDEPENDENT EXAMINER'S REPORT

Report to the trustees of Rooted In on the accounts for the year ended 31 July 2019.

Respective responsibilities of Trustees and Examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144(2) of 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 Charities Commission (under Section 145 (5)(b) of the 2011 Act), and
- To state whether particular matters have come to my attention

Basis of Independent Examiner's Statement

My examination was carried out in accordance with general directions given by the Charities Commission. 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 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 no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

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 130 of the 2011 Act; and
- To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act 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.

S J Sutcliffe F.C.C.A.
Torevell Dent Limited
1-3 St Ann's Place
Pellon Lane
Halifax
HX1 5RB

LIVES TRANSFORMED

At the heart of Rooted In is our community of Allerton and the people who call it home. One of these people is Tina. We had known of Tina for a number of years. Our relationship was more at a distance as she got on with her busy life with her kids. However this all changed 4 years ago when she gave birth to twins with one tragically passing away at 8 days old.

The grief and pressure on Tina to continue raising a family along with a new born, whilst mourning the loss of her son was too much. At this point she connected with some of our team during a breakfast club and family cooking class. We made the time to sit with her, listen and journeyed her grief and struggles alongside her.

On opening the coffee shop Tina made it very clear this was for her! She came on board as a volunteer and now is on the payroll. Over the year Tina has come alive and found real purpose working as part of our team. She is now free from her depression and anxiety coming off all medication, which her and her doctor directly attribute to her involvement with Rooted In and our commitment to support, encourage and believe in her. She is now an integral team member helping us develop new ideas and reach more people in our community.

Tina's story was recorded as part of the Redbull Amaphiko event in Bradford showcasing some of the grassroots transformative work charities and social enterprises are doing in our city.



TWELVE

ACKNOWLEDGEMENTS

Whilst the year has been a challenging one negotiating significant change across the sector and locally, we have arrived at this point in no small part due to the incredible generosity of many people.

This generosity has ranged from time, donated equipment and material, pro bono professional services, mentoring and consultancy and financial donations.

Martin Teal - Keystone Finance & St. James' Place Wealth Management

Rev. Harry Gwennit – St. James Church Thornton

Saffron Dean Community Association

Allerton Methodist Church

Gaie Scouller – Sobell Foundation

LIFE Church Bradord

The many other generous individuals who have contributed to individual appeals or regular giving across the year



THIRTEEN