



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' annual report (including Directors' report) for the period

From: 01/07/2018      Period start date      To: 30/06/2019      Period end date

Charity name: Ashok Tree Foundation

Charity registration number: 1158960

Company number:

## Objectives and activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	Address the comprehensive needs of the specific village of Paliapattu in Tiruvannamalai, Tamil Nadu, India, in particular by supporting the Yogi Ashokananda Foundation, registered India Charity, BK 4/50.  The foundation will address specific needs in London, initially
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	Projects in the U.K. in India / 5 key programs: 1. Education - primary school in India and funding for advanced education. 2. Healthy Body - yoga classes/workshops in India & UK 3. Healthy Mind - Meditation classes/workshops in India & UK 4. Healthy Food - Hot nutritional meals for students in India 5. Environmental & Animal Awareness
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	In setting our objectives and planning our activities our Trustees have given careful consideration to the Charity Commission's public benefit guidance.

## Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	Grants are issued via partnership agreement with Yogi Ashokananda Foundation, Indian registered charity, BK4/50 . All projects to receive grants are pre-approved through a business planning and review process with our partner.
Policy on social investment including	Para 1.38	

program related investment		
Contribution made by volunteers	Para 1.38	Ashok Tree Foundation is supported 100% by volunteers, sponsors and supporters on a grassroots basis. Various groups of volunteers in the UK and India manage the Foundation, plan fundraising events, host events, teach community classes and provide health care.
Other		The Ashok Tree Foundation has a generous group of sponsors who have contributed through personal donations, enabled corporate donations and organised / managed events.

## Achievements and performance

Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p><b>Weekly Yoga Classes</b> - A key value of the Ashok Tree Foundation is to ensure yoga is available to all who require it regardless of their mental or physical abilities and financial status. Over 200 people per week participate in 20+ yoga classes across UK, being delivered by volunteer certified teachers.</p> <p><b>Weekly Meditation Classes</b> – Regular Meditation classes are offered in several London locations with 50+ regular participants weekly. The meditation sessions are offered on a volunteer basis by the certified teachers from the Yogi Ashokananda School who guide the meditation sessions. The meditation on self – ATMA Kriya Meditation - helps to manage stress, still the mind and body and provides a more balanced approach to day to day life. The teachers provide meditation / mindfulness tips and techniques to the participants to encourage their own development through regular practice.</p> <p><b>Sita Devi Charity School</b> - The Sita Devi Charity School continues to operate as a full primary school, of educating 116 children as of the June 2019/20 school year across all primary school years LKG, UKG &amp; years 1-4 (aged 4 -10). 114 children advanced to the next level from the previous school year, all with passing grades with 16 new children enrolled into LKG. Receiving a well-rounded education based on the Indian national curriculum, complemented with daily lessons in yoga, meditation, 3 languages, Tamil, Hindi &amp; English, hygiene, nature &amp; environment science and a new music program.</p> <p>Food program provides a daily hot meal for the students and faculty 5 days per week. The children are taught about the food they eat, how to prepare it hygienically, and becoming aware of the senses involved in the preparation and eating. They are developing a keen interest to learn more about the food that goes in their bodies.</p> <p><b>School Maintenance</b> – New water tanks and system were installed at the school during this period to ensure no maximum water shortage during the school days.</p>
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		<p>Final decorating of the inside of all classrooms and planting around the school's leased property.</p> <p>Designed and received initial product samples for desks / chairs for the classrooms. Financing and delivery of the desks / chairs scheduled for the next school year.</p> <p>Windows/screens and solar powered energy to be reviewed during the next financial year.</p> <p><b>Community Hall Construction</b> – Yashoda Bhavan. Community Hall estimated to be 2500 SQF, which opened in December 2017, provides a general assembly hall for the school and local community. Yoga &amp; meditation classes for the school to be held daily in the hall, along with lunch for the school &amp; staff and some golden hour activities. Outside of school use, the planned uses include community meetings, cultural events and health clinics for the local community. .</p> <p><b>Healthy Food</b> –We support the Yogi Ashokananda Foundation's food program, where they provide 2 daily hot meals for the 17 adults in need. They were selected due to their varying degrees of disabilities and whom are overlooked by the government food schemes and their own families and communities.</p> <p>We continue to directly support the daily food program at the school for all students and staff.</p> <p><b>Health Clinic</b> - In partnership with Yogi Ashokananda Foundation, the health clinic, 20 metres from the school facilities, provides first aid services to the students and school staff. This facility also provides oversight on the children's nutritional needs.</p>
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### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

## Financial review

Review of the charity's financial position at the end of the period	Para 1.21	<div>ASHOK TREE FOUNDATION CHARITY NUMBER 1158960 RECEIPTS AND PAYMENTS ACCOUNT FOR THE PERIOD 01.07.2017 - 30.06.2018</div> <table><thead><tr><th></th><th>2019</th><th>2019</th><th>2018</th><th>2018</th></tr></thead><tbody><tr><td>Total receipts (unrestricted funds)</td><td></td><td>14,996</td><td></td><td>26,086</td></tr><tr><td>Payments made</td><td></td><td></td><td></td><td></td></tr><tr><td>Grants made</td><td>22,006</td><td></td><td>30,867</td><td></td></tr><tr><td>Cost of fundraising</td><td>1,516</td><td></td><td>1,652</td><td></td></tr><tr><td>Bank charges</td><td></td><td></td><td></td><td></td></tr><tr><td>Accountancy</td><td>432</td><td></td><td>420</td><td></td></tr><tr><td></td><td></td><td>(23,954)</td><td></td><td>(32,939)</td></tr><tr><td>Surplus / (deficit)</td><td></td><td>(8,957)</td><td></td><td>(6,853)</td></tr><tr><td>Reserves b/fwd</td><td></td><td>25,662</td><td></td><td>32,515</td></tr><tr><td>Reserves c/fwd</td><td></td><td>16,705</td><td></td><td>25,662</td></tr><tr><td>Bank balance</td><td></td><td>16,705</td><td></td><td>25,662</td></tr></tbody></table>		2019	2019	2018	2018	Total receipts (unrestricted funds)		14,996		26,086	Payments made					Grants made	22,006		30,867		Cost of fundraising	1,516		1,652		Bank charges					Accountancy	432		420				(23,954)		(32,939)	Surplus / (deficit)		(8,957)		(6,853)	Reserves b/fwd		25,662		32,515	Reserves c/fwd		16,705		25,662	Bank balance		16,705		25,662
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Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<p>Primarily the reserves are allocated to the Grants issued to manage the committed operational expenses in India.</p> <p>Any surplus will be allocated to the expansion of the school project in India.</p>																																																												
Amount of reserves held	Para 1.22	As above in in 1.21 Financial Position																																																												
Reasons for holding zero reserves	Para 1.22																																																													
Details of fund materially in deficit	Para 1.24																																																													
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23																																																													

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	

Other		

## Structure, governance and management

Description of charity's trusts:		
Type of governing document: for example, trust deed, memorandum and articles of association etc	Para 1.25	<b>Constitution</b>
How is the charity constituted? for example limited company, unincorporated association, CIO	Para 1.25	<b>CIO</b>
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<p>Apart from the first charity trustees, every appointed trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees.</p> <p>Every charity trustee must have</p> <p>Particular experience based on specific role description if working as a management trustee or</p> <p>Specific skill or experience which the CIO requires at the time or</p> <p>Specific experience in the communities served by the CIO or</p> <p>Ability to be key stakeholder in the CIO's fundraising plans; plans will be focused on individuals, corporates or 3rd sector grants</p>

## Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	Policies Available: Complaints Conflict of Interest Investment Risk Management Volunteers Children Health & Safety Paying Staff
	Para 1.51	

The charity's organisational structure and any wider network with which the charity works		
Relationship with any related parties	Para 1.51	
Other		

## Reference and administrative details

Charity name	<b>Ashok Tree Foundation</b>
Other name the charity uses	
Registered charity number	<b>1158960</b>
Charity's principal address	Prospect House Crendon Street High WYCOMBE Bucks HP13 6LA

## Names of the charity trustees who manage the charity

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
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1	Ashok Kumar	Vice Chair		
2	Michele Carvalho	Head of Projects		
3	Francesca Quaradeghini			
4	Raj Salverajah	Head of Finance		
5	Melvyn Carlile	Chairman		
6	Willow Kemp			
7	Malcolm Berger			
8	Carolina Karita Massara			
9	Kwok Ying Chan	Head of Finance	25 June 2019	
10	Richard Manle	Head of Legal	25 June 2019	
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20				

Corporate trustees – names of the directors at the date the report was approved

Director name	

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year

**Funds held as custodian trustees on behalf of others**

Description of the assets held in this capacity	

Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

### Additional information (optional)

#### Names and addresses of advisers (optional information)

Type of adviser	Name	Address
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#### Name of chief executive or names of senior staff members (optional information)

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### Exemptions from disclosure

Reason for non-disclosure of key personnel details

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### Other optional information

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## Declarations

The company has taken advantage of the small companies' exemption in preparing the report above.

The trustees declare that they have approved the trustees' report (including directors' report) above.

Signed on behalf of the charity's trustees/directors

Signature(s)		
Full name(s)	Michele Carvalho	
Position (for example Secretary, Chair, etc)	Trustee, Head of Projects	
Date	20 April 2020	

**ASHOK TREE FOUNDATION**  
**CHARITY NUMBER 1158960**  
**RECEIPTS AND PAYMENTS ACCOUNT**  
**FOR THE PERIOD 01.07.2018 - 30.06.2019**

	<b>2019</b>	<b>2019</b>	<b>2018</b>	<b>2018</b>
<b>Total receipts (unrestricted funds)</b>		14,996		26,086
<b>Payments made</b>				
Grants made	22,006		30,867	
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		-23,954		-32,939
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