

Trustees' annual report for the period



CHARITY COMMISSION
FOR ENGLAND AND WALES

Period start date

0	1	0	7	1	6
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 Period end date

3	0	0	6	1	7
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Charity name

Ashok Tree Foundation

Charity No
(if any)

1	1	5	8	9	6	0
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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 and address <u>specific needs in London, initially.</u>
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	<ol style="list-style-type: none"> 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 in India 5. Community Yoga & Meditation in UK
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Trustees have received all documentation from the Charities Commission providing guidance on Public benefit.

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 to Yogi Ashokananda Foundation, a registered charity in India and on all pre approved projects with budget and spending oversight.
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	We are 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		

Achievements and Performance

	SORP reference	
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>United Kingdom</p> <p>Community Outreach Programs</p> <p>Weekly Yoga Classes - Over 200 people per week participate in 20 yoga classes</p> <p>Weekly Meditation Classes – Regular Meditation classes are offered in several London locations with 50+ regular participants weekly.</p> <p>Monthly Gatherings – The foundation's supporters host meditation evenings, Sanghas. Each of these programs help the participants to manage stress and achieve a more balanced lifestyle, even when physical or mental illness are present:</p> <p>India:</p> <p>The Sita Devi Charity School (YAF Grants) are educating 100 primary school children 86 children advanced from prior year.</p> <p>Food program provides a daily hot meal for the students and staff 5 days per week and 27 adults with varying degrees of disabilities</p> <p>School Construction – Funded the completion of the second phase of construction of the school, completed in the prior period</p> <p>Community Hall Construction – Allocated funding for the initial phase construction of the community hall, Yashoda Bhavan. Community Hall ~3200 SQF, which opened in December 2017</p>

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Achievements against objectives set	Para 1.41	Generally, we are delivery against our stated objectives and have overachieved in the establishment of the food program (by adding the at risk adults) and the funding of the community hall's construction
Performance of fundraising activities against objectives set	Para 1.41	Through 2 non budgeted grants received (£20,000) we were able to raise the funds support the development projects above, relieving some burden off of the annual fundraising programs.
Investment performance against objectives	Para 1.41	n/a
Other		

Financial Review

	SORP reference	
Review of the charity's financial position at the end of the period	Para 1.21	Submitted as separate document.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Primarily the reserves are allocated to the Grants issued to manage the committed operational expenses in India. Any surplus is allocated to the expansion of the school project in India
Amount of reserves held	Para 1.22	
Reasons for holding zero reserves	Para 1.22	
Details of fund materially in deficit	Para 1.24	There are not any funds in deficit.
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:

	SORP reference	
The charity's principal sources of funds (including any fundraising)	Para 1.47	Patrons (large donors), Monthly donations from supporters, Grants received from other charities and some corporate sponsors
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:	SORP reference	
Type of governing document (trust deed, royal charter)	Para 1.25	Charitable Incorporated Organisation (CIO) Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	As stated in Constitution. must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policies and procedures adopted for the induction and training of trustees	Para 1.51	The charity trustees will make available to each new charity trustee, on or before his or her first appointment: a copy of the current version of this constitution; and a copy of the CIO's latest Trustees' Annual Report and statement of accounts
The charity's organisational structure and any wider network with which the charity works	Para 1.51	Board of Trustees with management from an operational management team
Relationship with any related parties	Para 1.51	Partnership Agreement with Yogi Ashokananda Foundation India registered Charity
Other		

Reference and Administrative details

Charity name	Ashok Tree Foundation
Other name the charity uses	
Registered charity number	1158960
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)
1	Melvyn Carlile	Chairman		
2	Ashok Kumar	Vice Chair		
3	Michele Carvalho	Head of Projects		
4	Surendran Selvarajah	Head of Finance		
5	Gee Loong	Head of Legal	3 March 2017	
6	Laura Clerici		18 December 2016	
7	Francesca Quaredeghini			
8	Willow Kemp			
9	Caroline Karita Massara			
10	Malcolm Berger			
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Reference and Administrative details

(cont)

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

Name of chief executive or names of senior staff members (Optional information)

AS LISTED IN THE TRUSTEE SECTION ABOVE.

Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

Michele Carvalho

Full name(s)

MICHELE CARVALHO

Position (eg Secretary,
Chair, etc)

HEAD OF PROJECTS

Date

29 APRIL 2018

Ashok Tree Foundation

Year Ended 30 June 2017

Independent Examination Report

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF ASHOK TREE FOUNDATION

I report to the charity trustees on my examination of the accounts of the charity for the year ended 30 June 2017.

Responsibilities and basis of report

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect, the:

- accounting records were not kept in respect of the charity as required by section 130 of the Act; or
- the accounts do not accord with those records; or
- the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



.... Independent Examiner

27 April 2018

..... Date

Richardson Jones
Chartered Accountants
Mercury House
19-21 Chapel Street
Marlow
Bucks
SL7 3HN

**ASHOK TREE FOUNDATION
CHARITY NUMBER 1158960
RECEIPTS AND PAYMENTS ACCOUNT
FOR THE PERIOD 01.07.2016 - 30.06.2017**

	2017	2017	2016	2016
Total receipts (unrestricted funds)		59,570		17,959
Payments				
Grants made	34,221		10,000	
Cost of fundraising	1,080		2,367	
Administrative expenses	732		288	
Bank charges				
		(36,033)		(12,655)
TRANSFER TO RESERVES		23,537		5,305
RESERVES B/FWD		8,978		3,673
RESERVES C/FWD		32,515		8,978

**ASHOK TREE FOUNDATION
CHARITY NUMBER 1158960
BALANCE SHEET AS AT 30.06.2017**

Bank balance	32,515	8,978
Reserves	32,515	8,978