

# The Link Visiting Scheme

## Annual Report and Accounts

2021 / 22



 **the Link**  
visiting scheme



The Queen's Award  
for Voluntary Service

*Confronting loneliness,*  
**celebrating friendship.**

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**The Link Visiting Scheme are  
proud recipients of The Queen's  
Award for Voluntary Service 2021**

# Introduction

Welcome to the 2021/ 22 Annual Report and Accounts from The Link Visiting Scheme, the befriending charity in Wokingham Borough. We're excited to share the impact of our work on confronting loneliness and isolation by creating connections that transform lives.

Loneliness is seen by many as one of the largest health concerns we face. It's painful. It's harmful to our bodies. It puts us at a greater risk of developing dementia, heart disease and depression. It's so serious that it even shortens our life expectancy.

- **Loneliness is as bad for your health as smoking 15 cigarettes a day** (1)
- **76% of GPs report that between one and five patients a day attend primarily because they are lonely** (2)
- **In Wokingham, one in three over 65s live alone** (3)

## About us

The Link Visiting Scheme was founded more than 24 years ago to help reduce loneliness amongst older people and to bring generations together in friendship and shared experiences. We have seen the positive impact of friendship where we provide quality time, a listening ear and focused attention on individuals who so often feel invisible and forgotten. We have seen thousands of lives transformed, and in 2021/22, we continued to reach hundreds of older people through

our work. We could not offer this life-changing help without our volunteers, partners, and employees. We have a unique understanding, not only of the root causes and impacts of loneliness, but also how best to tackle them in the local area. Our expertise is based on years of experience and collaboration with, and learning from, other organisations both locally and nationally.

Our focus is on promoting and enabling friendships in everything we do. When we receive a referral for someone in the grips of loneliness, we need to respond quickly, with sensitivity, kindness and skill.

We have developed a pathway that enables us to respond quickly to a referral and support the individual on their journey to establishing long term friendships and broadening social circles to include both interactive activities and events. We take people from isolation to a feeling of social wellbeing in their local community with local volunteers.

In April 2021 we were delighted and honoured to have been awarded The Queen's Award for Voluntary Service - the highest award a voluntary group can receive in the UK. Equivalent to an MBE, it is awarded for life. We also received special recognition for our response to the pandemic. We could not be prouder of our incredible volunteer family, whose hard work and dedication are at the heart of all we do.





## A year in numbers

**45,000**

volunteer hours

**720**

Link Friends benefitted

**486**

volunteers got involved

**469**

total active Link Friends

**86%**

of our Link Friends have a disability including significant mobility issues, dementia or mental health concerns



**269**

assessments completed

**32 to 101**

was the age range of Link Friends

**230**

Link ups completed

**345**

referrals received

**9**

staff members in our team

**5**

trustees helped guide Link Visiting - John, Michael, Anne, Laura and Gayle



## Improving social wellbeing

We have developed a specialist pathway to support people in their journey to being better connected. As social wellbeing increases, the need for support from outside agencies reduces.



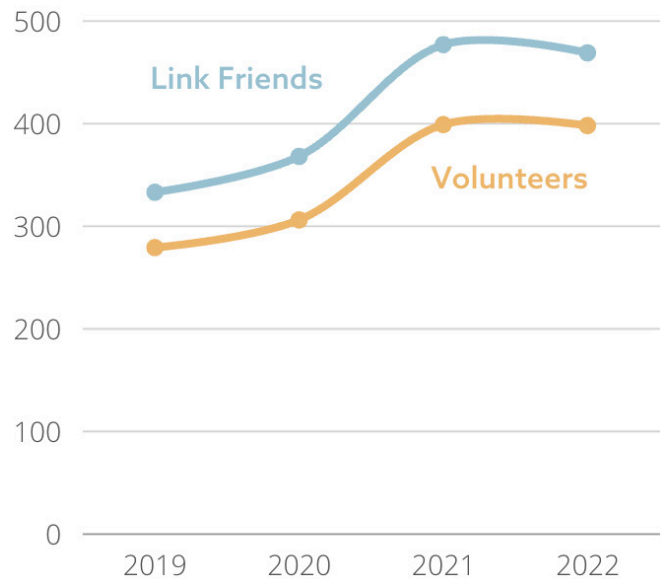
We provide a range of friendship-based services within our pathway framework, including telephone-based interim support 'Link Express', long-term one-to-one befriending, small social groups 'Friendship Groups' and larger community events.

Using our highly personalised approach, we evaluate how we can best assist our Link Friends to achieve social wellbeing using our innovative pathway approach.

## Making a difference

We are well-embedded in our local community receiving referrals from many sources including Community Navigators and NHS Social Prescribers. Demand for our services continues to grow, with referrals increasing from an average of five per month pre-pandemic to 30.

Since 2019 the number of Link Friends has grown by over 40%.



We see the transformative impact of our work daily and receive wonderful feedback from our Link Friends who consistently rate our services highly (81% rating us excellent in our last survey) and allow us to assess their social wellbeing regularly.

**Over 50% of new clients report an improvement in social wellbeing in the first 12 months of becoming a Link Friend**



# Key achievements

## Winning the Queen's Award for Voluntary Service

We were absolutely thrilled for the hard work of our volunteers to be recognised by receiving the Queen's Award with a special mention for their outstanding contribution to the community during the pandemic. We celebrated together by holding a garden party in the beautiful grounds of Ludgrove School.

**"The strength, quality and dedication of our volunteers is a constant reason for our charity to be thankful. I couldn't be prouder of each and every one"**

- Karan Pollard, Volunteer Coordinator



**I am sure I am not alone when I say I feel privileged to be a small part in the Link Visiting Scheme & so very proud of the award which is well deserved. I shall wear my medal with great pride!"** - Link volunteer

## Launching our Active Minds programme to support those living with dementia

'One in 14 people over the age of 65 have dementia, and the condition affects 1 in 6 people over 80. The number of people with dementia is increasing because people are living longer. It is estimated that by 2025, the number of people with dementia in the UK will be more than 1 million.' - NHS

We know that those living with dementia often withdraw from friends, hobbies and group activities as symptoms become more difficult to manage and loneliness can make life harder for the carer too.

Active Minds' group sessions are for older people who are experiencing symptoms of cognitive impairment such as forgetfulness, difficulty making decisions, increased anxiety and reduced ability to follow instructions.

The programme is based on some of the techniques we use in the delivery of Maintenance Cognitive Stimulation Therapy (MCST) for early-stage mild to moderate dementia sufferers. 'Active Minds' groups comprise no more than 10 older people who will participate in volunteer-facilitated activities such as quizzes, word games and discussions designed to stimulate thinking in an informal, reassuring environment with the key objective to improve confidence, make new friends and have fun. Each course consists of 8 consecutive weekly sessions. Older people can refer themselves or be referred via family members or professionals. There is a high demand for these sessions given the lack of interaction and stimulation so many of our older residents have suffered during the pandemic.

**"Coming along to Active Minds was the highlight of my week and I've made wonderful new friends who are in the same boat as me. We now go along to Bowls and Pub Lunches together. My son says joining Link Visiting was the best thing that happened to me"**

- Active Minds attendee



## ***Launching our Keeping In Touch (KIT) programme, A new initiative to support the most vulnerable***

Working closely with Wokingham Borough Council this project began with the aim to prevent the needs of older people escalating. With early intervention and effective signposting we hope to see older people living independently for longer with improved wellbeing and reducing and delaying the need for longer term statutory support.

## ***Establishing and developing the Friendship Alliance***

Partnership lies at the heart of the Friendship Alliance and was formed to tackle loneliness, recognising that working together enables better outcomes, increases capacity to meet the needs of communities and reduces health inequalities. The connections that our partners are making in our communities, be that delivering at grassroots level, promoting community events or working collaboratively all help to maximise impact and help to build a stronger, more connected and kinder community. This year we became the lead organisation in the Alliance.

The founding members are:

- ➔ The Link Visiting Scheme
- ➔ Age UK Berkshire
- ➔ Wokingham Volunteer Centre
- ➔ Involve Community Services

These organisations are all experts in their field with a strong understanding of the needs of our community and have been operating as an effective partnership since the inception of the Friendship Alliance three years ago. Alliance partners operate independently, continuing to deliver services as discrete charities.

Being part of Friendship Alliance framework, both complements, and greatly expands, the ability of WBC to engage with socially isolated people, increases visibility of the range of services available across the Borough and greatly helps charities to manage demand.



- ➔ 274 new activities which have been identified as friendly and welcoming have been promoted and shared
- ➔ 27 Friendship Tables in cafes and organisations across the borough, manned by volunteers. People have somewhere to go every day of the week where they will receive a warm welcome and meet a friendly face, so far reaching over 380 people.

## ***Celebrating on Christmas Day***

We know that for many, Christmas is a difficult time if you are on your own. So we are committed to giving everyone we support and the wider community an opportunity to be together and celebrate. Along with a full Christmas programme of events, we also ensure anyone on their own on Christmas Day can enjoy some company, some delicious food and presents too!

This year, we continued to offer our Christmas Meal delivery service to just under 100 people who would otherwise not see anyone with a huge team of over 50 volunteers. This included a small team of professional chefs who donated their time and expertise to ensure our Link Friends had a delicious meal and a Christmas to remember.

***"Sophie has been refusing help and struggling with her mental health but she was immensely touched by the food and gifts, and was particularly taken with the lovely blanket, which is by her side constantly. It helped her get through a particularly difficult day. The work you all do is absolutely invaluable."*** - Senior Social Worker

## Clients benefitted from new services

We continued to innovate our services and made significant progress in their delivery.

### Link to Nature

An ongoing seasonal programme designed to re-awaken an interest in nature, enrich friendships and improve wellbeing. Launched in early 2021 this project now reaches 45 Link Friends and their volunteers and we are delighted to work closely with Wokingham in Bloom and Wokingham Horticultural Society to deliver plants, recycle plant pots and hold special interest talks and outings.

### Link Online

Opening doors to digital group activities, services and interests for Link Friends. We have delivered over 30 tablet computers to older people providing them with individual coaching and support to get them online and pursue their interests.

We have received 118 referrals and helped over 95 people with their own devices. We have 18 'digital' volunteers who work with each person on an individual basis.

Bill at 92yrs old wanted to learn how to use a tablet computer with enthusiasm. **"He has shown a real interest to learn about his tablet. He is getting a lot of enjoyment searching for classical music via Google and then viewing it in YouTube. This, alone, is a joy to see. He uses the voice command when searching on Google and helped to use Gmail and has been sending and receiving emails."**

**We have done things together like attach a photo of his dog, Lady, and sent it to one of his daughters who only uses email. We've introduced him to Whatsapp too and he has been having fun sending/receiving messages, and has even had a video chat with another of his daughters."**

- Digital volunteer



### Friendship Groups

Regular get togethers, helping Link Friends to stay connected. We have 9 active groups ranging from a 'bridge club' a walking group, a group exploring local cafés and a 'grumpy mens club'! The focus is on broadening everyone's social circle in a supportive group setting.

### Link Express

Immediate support at a time of crisis. Link Express is an invaluable resource where we work with a small team of volunteers to call Link Friends who have been assessed but waiting for to be matched to a long term volunteer.

### Chair Yoga

Helping Older people to get moving again after the long period of lockdown in a safe and welcoming environment.

Joan\* came along to chair yoga and told us it was only the second time she has left her home since the lockdowns began. **"I was very anxious about coming along and last night had thought of all sorts of excuses I could make not to come, but in the end I got myself dressed, put my makeup on and made it! I really enjoyed the session and loved having a good chat to people afterwards. I'm so glad I was encouraged to make that first step to get out. Looking forward to the next one now!"** - Link Friend



We strengthened our reputation for collaboration and partnering and along with being the lead organisation in the Friendship Alliance we also...

### ***Moved our offices to the Charity and Community Hub***

We continued to work closely with our main strategic partner, Wokingham Borough Council and were delighted to move into the Charity and Community Hub in November 2021. The Hub now houses nine charities who are all delivering services in Wokingham Borough.

This has led to greater networking and partnership working in a town centre environment.

### ***Became a member of the Wokingham Voluntary Community and Faith Sector Steering Group***

This group is a network of charities who share common goals with their service users. These goals are to reduce the differences in health between different groups of people, to support individuals at high risk of bad health outcomes to live healthy lives, to ensure good mental health and wellbeing for all adults and to promote physically active communities.

Action groups are formed from this group and we are active members of the Loneliness and Isolation Action Group and the Voluntary Sector Action Group (VSAG).

**"Thanks to you, the four walls have disappeared. My life is so different now"**



# Looking ahead

For the coming year, our priorities relate to:

## Our clients:

- Focus on supporting older socially isolated residents in Wokingham Borough to ensure we can meet rising demand
- Maintain an 'open door' policy in terms of access to our services so that all can receive support and aim to reach a more diverse client group
- Enhance our support for other groups such as volunteers and carers recognising the wider impact of loneliness
- Focus on the cost of living crisis and work with our voluntary sector partners to ensure older people remain warm and well this winter.

## Our services:

- Ensure clients and volunteers play a full and active role in service design
- Recognising the issue of cognitive decline, work with key partners to form the Wokingham Dementia Partnership and ensure Wokingham Borough is a dementia friendly place to live
- Continue to develop our Activity Programme ensuring we are inclusive to all

## Our organisation:

- Exercise financial prudence to ensure we can continue to provide services for the long term
- Develop our organisational structure to ensure our staff team feel supported and equipped to perform their role to the best of their ability
- Increase our use of data to support decision-making and demonstrate impact

**"We are so different but we get on so well. We just click and it's great. I really appreciated the extra support over Christmas, the lunch, the presents, everything. Every town should have a Link Visiting!"**





## Link stories

### Julie\*

Julie joined Link Visiting during the pandemic. In her 70's with several long term health conditions that means she can only mobilise with a wheelchair.

Loneliness took hold and Julie was very anxious when she was referred to us. She told us: "my confidence plummeted, suddenly I had no visitors and was so worried about how I was going to manage. Being part of Link Visiting has been life changing for me. I now feel safe, knowing I've got them to turn to and I love seeing my volunteer. We spoke on the phone during the pandemic 2 or more times a week and I really looked forward to her call.

We now meet up face to face and she takes me out sometimes but mostly I just love having someone to talk to about the things I worry about and she cheers me up and I hope I cheer her up too. I send her pictures of my dogs and talk about everything. I am so grateful for Link Visiting and helping me get through a very difficult and lonely time in my life".

### John\*

"When my wife moved into a care home, I was lost and struggled to get through the day. I worried about visiting my wife because often she didn't recognise me and this upset me so much.

With the help of Link Visiting, I now understand a little more about dementia and they have helped me build up a better relationship with the care home who now support me. I've got a volunteer who visits regularly and she brings so much brightness to my day. I'm so glad I'm a part of The Link Visiting Scheme."

### Cathy\*

"Before joining The Link, Cathy talked about feeling very lonely and not wanting to go out, she said she almost became agoraphobic. She explained that she would have a little weep because she was feeling so lonely especially after her best friend had also passed away. When Cathy referred herself, she confided that she was 'feeling absolutely desperate'. We linked Cathy up with Sally and they both talk about how well they get on: "Sally is absolutely brilliant, and I am really, really pleased with how things are going. Sally has taken me on several walks and it has given me the determination to get fitter. I've now joined a local fitness and swim class. My confidence has already increased since joining the link and meeting Sally. I am so grateful to the Link."

### Alex

The Link team do a fantastic job supporting our Link friends and volunteers. I started volunteering with the Link through the Community Kitchen Project in 2020 and then being a telephone buddy. In all aspects of my interaction with our Link Friends I believe I get more out of it, in terms of value and feel good, than I put in. Its great and I would highly recommend volunteering and making new friends.

\*names changed





## Chair's statement

The lives of our Link Friends, and the services we provide, have been hugely impacted by the pandemic, but as we all emerged from lockdown this year there is every reason to feel confident The Link Visiting Scheme (The Link) can be even more effective in confronting loneliness and helping transform lives in the community through friendship!

At the start of 2021, 28% of Link Friends were under 75 years old with 8% aged under 60. Although the chronically lonely (those who feel often or always alone), particularly those living alone, are the group we can offer most help to, our services are not restricted to only this category. Our "open door" policy means no one is turned away without considering how we can help directly, via the Friendship Alliance, or through signposting to other organisations.

Our strategy this year defined priorities, including:

- Link Friend, staff team and volunteer well-being
- Reablement of our Link Friends
- Additional help for Link Friends with dementia
- Successfully move to the new charity hub
- Managing increased demand and growth

We have already made substantial inroads in all these areas. We started the re-launch of our activities in the second half of the year, understanding that extra care was needed with many Link Friends nervous at the prospect of re-engaging in the community post lockdown. The team's "reablement" approach has shown great dividends and one by one we have rolled out our much-loved activities like pub lunches and bowls and introduced new ones like Link to Nature and Active Minds.

We celebrated winning both WBC competitive tenders we entered, gaining substantially increased funding for our core befriending service as well as new funding for our role as lead charity of The Friendship Alliance, expanding our ability to confront loneliness in partnership with Age UK Berkshire, Involve Community Services and the Wokingham Volunteer Centre.

We do face some major challenges, however. Whereas

the pandemic initially led to an increase in the availability of volunteers, "Covid fatigue" has led to the reverse effect post lockdown. Demand for our services is rising while finding new volunteers is increasingly challenging. This year we said farewell to four of our most experienced team members who shared over 20 years of experience. While they will all be sadly missed and have played a huge part in creating a great local charity, we will treat the task of finding new team members as an opportunity to reorganise, refocus and build an even better Link!

I would like to thank fellow trustees for the tremendous support they have given to the staff team and volunteers over what has been another challenging year. I would particularly like to thank Anne Constable, who resigned as a trustee and volunteer this year for personal reasons. Her contribution to the charity will be missed in many ways, not least for the real empathy and understanding of the needs of our Link Friends she brought to her roles. On behalf of all trustees, I want to offer huge thanks to our CEO Marjie Walker and her entire team, past and present, for creating such a fantastic local charity, giving us the real privilege of playing our part in helping so many Link Friends play an active part in the community.

Recognition across Wokingham Borough of the positive outcomes delivered by The Link to some of the most vulnerable in our community continues to grow. We look forward to confronting loneliness through celebrating friendship for many years to come, bringing as many smiles as possible to the faces of our Link Friends! We also look forward to sharing our stories of Friendship widely so we can spread the word and help others transform lives with friendship!

*John Mallaghan*

**John Mallaghan**  
Chair of Trustees



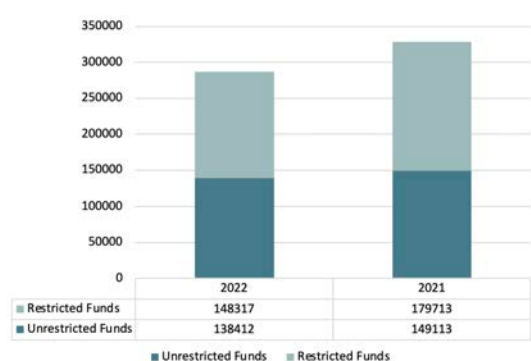
# Financial review

## Overview

Following two years of extraordinary growth during and immediately following the COVID-19 pandemic, our focus turned towards the reablement of our Link friends as restrictions began to ease. Our total income was sufficient to cover our expenditure for 21-22 which had increased by 15.5% (see section below), despite income dipping 12.8% to £286,729 compared to 2020-21 (£328,828).

Link Visiting Scheme works very closely with Wokingham Borough Council in providing our services to local residents, and we were delighted to secure continued funding from this important revenue source for a further three years. Whilst contracts continue to be negotiated, these grants will assist enormously in meeting our expenditure which has remained at significantly elevated levels compared to the period immediately pre-pandemic.

### Restricted v unrestricted income



## Income from grants

Wokingham Borough Council (WBC) continued to be our largest single source of funding, contributing in total £162,094 (2021: £117,870) which accounts for 56.5% (2021: 36%) of our total income.

We received funds from a further 46 organisations (2021: 21 organisations) which reflects the significant efforts of our team to meet our fundraising target. These other sources were generally smaller in nature than last year and ranged in size from £15,000

down to less than a hundred pounds, yet we are most grateful for every single donation received, all of which go towards enabling us to continue our work. List of donors can be found in note 2. Total income from grants for the year fell by 11.4% to £240,805 (2021: £271,938). This was principally due to a substantial one-off grant in 2021 which was not repeated this year. Receipts from other fundraising activities remain significantly reduced due to the impact of COVID-19 restrictions putting such activities on hold.

## Other income

Continued COVID-19 related difficulties meant that our own fundraising efforts from events and activities remained substantially depressed from pre-pandemic levels at £3,276 (2021: £1,251). The gradual reopening of such events continuing to perpetuate this effect. Personal giving has to a large extent helped to offset the effect of the COVID-related limitations to fundraising during the pandemic, and despite falling back significantly has continued to represent a meaningful proportion of our income for the year at £42,648 (2021: £55,638). We are very grateful to everyone who has kindly given their support to Link Visiting during the period.

## Expenditure

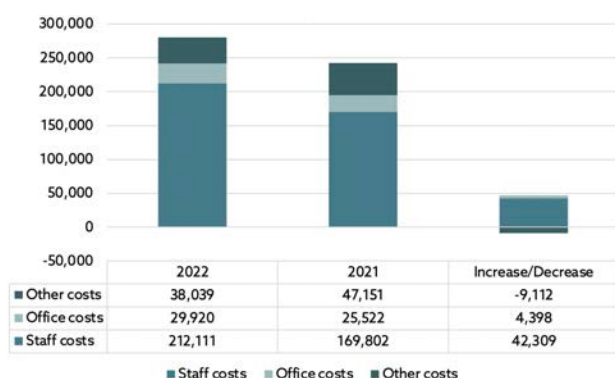
Our expenditure on charitable activities during the period increased to £280,069 (2021: £242,476), representing a 15.5% increase to our already elevated expenditure levels compared to the pre-pandemic period. Office costs increased 17.2% compared to 2021 due to a move from our independent offices to the more modern and collaborative Charity Hub. The largest increase was in staff costs which totalled £212,111 (2021: £169,802), representing an uplift of 24.9%.

The key reasons for the increase in staff costs during the period were:

- A pay increase of 5% across the staff team, reflecting the high level of living costs inflation over the period, and our desire to ensure our pay scales remain competitive in the marketplace.
- A discretionary fund of £2,000 was granted to the CEO to reward outstanding performance to individual team members.
- The team size increased markedly during the previous period although some of these additional

- team members joined part-way through the year. Although headcount did not increase during this reporting period, this is the first full-year of a team staffed to current levels.
- The staff-related employment expenses such as pension and social security commitments, which are included within staff costs, increased accordingly.
- As new members joined the team, additional training costs were incurred.
- Mileage and parking expenses were almost 4 times the level of last year, reflecting the lifting of lockdown restrictions and the requirements for the team to be more mobile.

### Expenditure 2022 v 2021



## Financial position

Net assets have increased slightly from £366,065 on 31st March 2021 to £372,725 on 31st March 2022. Cash resources as at the same date have increased from £351,650 to £366,849. Restricted funds have increased from £93,643 to £119,053, whilst Unrestricted funds have reduced from £272,423 to £253,673. Of this Unrestricted figure, the trustees resolved in 2019 to designate £150,000 of the large legacy bequest received in 2018 for a major project as discussed in previous annual reports.

## Investment policy

The assets of the charity are currently held in current and deposit bank accounts. Should other opportunities arise to invest surplus funds then the trustees would discuss these, however at the present time longer term investment is inappropriate. This remains under review.

## Reserves policy

The trustees continue to monitor the charity's requirements for reserves considering the main risks to the organisation, recognising the need to bridge the gap between the spending and receiving of income and to cover unplanned emergencies and other expenditure.

On 31 March 2022, general funds were £103,673 which equates to 37% of the total expenditure incurred in the year then ended. The trustees are satisfied that this level of funds is sufficient to meet the charity's on-going activities for the time being although it is at the lower end of the level with which we are comfortable.

The trustees aim to increase the level of reserves to more than 6 months' total expenditure given the current economic environment, uncertainties created by the cost-of-living crisis and taking into consideration the rapid rate of increase in our total expenditure. This will remain under review in the coming years.

## Legacy bequest - designated funds

In 2018 the charity received a large and unexpected legacy in the sum of £160,361. At the time, the Trustees resolved to designate £150,000 of this for a major project, the details of which to be decided. Due to the COVID-19 pandemic which ensued, it was not possible to progress these plans and the amount remains designated within our unrestricted funds. This is to be further reviewed by the Trustees in the coming year to decide how best to deploy these available funds.

## Risk statement

The trustees have reviewed the risks to which a medium-sized charity operating with a small number of full-time and part-time employees is exposed. Appropriate procedures are in place to identify, monitor and review these risks on a regular basis.

**Michael Roberts**  
Finance Trustee





# Trustees report

## Statement of trustees' responsibilities

The trustees are responsible for preparing the Trustees' Report and the Financial Statements in accordance with applicable law and United Kingdom Accounting Standards (UK Generally Accepted Accounting Practice).

Company law applicable to charities in England and Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles in the Charities SORP;
- Make judgments and accounting estimates that are reasonable and prudent; and
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records that are sufficient to show and explain the charity's transactions and disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Companies Act 2006, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the Trust Deed.

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 was approved by the trustees on 12/12/2022 and signed on their behalf by:



**John Mallaghan**  
Trustee

**Michael Roberts**  
Trustee

## Our trustees

- Mr John Mallaghan – Chairman (Appointed 16 June 2021)
- Mrs A. Gayle Manicom (Appointed June 2018)
- Ms Laura Mitchell (Appointed 9 December 2020)
- Mr Michael Roberts (Appointed 9 December 2020)

Other trustees who served during the year:

- Mr S.T.M. Elliott – Chairman and Secretary (Resigned 16 June 2021)
- Mrs Anne Constable (Resigned 10 March 2022)

A trustee and a director of the company are the same. The appointments and resignations of the above persons have been registered at Companies House and with the Charity Commission as appropriate.

## Trustees' report

The trustees confirm that the annual report and financial statements of the Company comply with the Companies Act 2006, the Charities Act 2011, the Charities Statement of Recommended Practice (FRS 102), FRS102 the Financial Reporting Standard applicable in the UK and Republic of Ireland and the Company's Memorandum of Association.

# Independent Examiner's report

## Year ended 31 March 2022

I report on the financial statements of the Company for the year ended 31st March 2022 which are set out on pages 15 to 22. This report is made solely to the charity's trustees, as a body, in accordance with section 145 of the Charities Act 2011 and regulations made under section 154 of that Act. My work has been undertaken so that I might state to the charity's trustees those matters I am required to state to them in an Independent Examiner's Report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the charity and the charity's trustees as a body, for my work on this report.

## Respective responsibilities of trustees (directors) and examiner

The charity's trustees are responsible for the preparation of the financial statements. The charity's trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 and that an independent examination is needed.

It is my responsibility to:

1. Examine the financial statements under section 145 of the Act.
2. Follow the procedures laid down in the General Directions given by the Charity Commission under section 145(5)(b) of the Act; and
3. To state whether any particular matters have come to my attention.

## Basis of Independent Examiner's statement

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting

records kept by the Charity and a comparison of the financial statements presented with those records.

It also includes consideration of any unusual items or disclosures in the financial statements and seeking explanations from the trustees concerning 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 financial statements present a 'true and fair view' and the report is limited to those matters set out in the statement below.

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 Act; and
  - To prepare financial statements which accord with the accounting records and comply with the accounting requirements of the Act. have not been met; or
2. To which, in my opinion, attention should be drawn to enable a proper understanding of the financial statements to be reached.



**Timothy Randall BA ACMA**

Independent Examiner

40 Oxford Road, Wokingham  
Berkshire, RG41 2XZ

Date: 12/12/2022

# Reference and administrative details

## Governing document

Memorandum and Articles of Association incorporated 18 August 2010.

## Objectives and activities

Summary of the objectives of the Company: Our mission is outlined in the 'About us' section of the report. Well over 1,000 Link Friends have benefited over the years from our services. We aim to give their lives more purpose and joy, enabling them to integrate into the community and build new, lasting friendships.

## Public benefit

The Company's objectives and principal activities are described above. All our activities focus on combatting social isolation in the Wokingham Borough and surrounding area, and are undertaken to further our charitable purposes for the public benefit.

The outcomes that the Company aims to deliver through its services to benefit individuals, our communities, and the civic purse are to:

- Improve activity and mobility for clients
- Prevent depression and achieve improved mental health
- Delay or postpone need to enter residential care homes
- Delay or postpone need for provision of care at home
- Improve self-confidence and self-esteem, supporting independent living
- Improve volunteer social involvement and engagement
- Indirectly support carers and statutory services.

## Principal activities

The Company's principal activity is the provision of a befriending service for lonely, isolated elderly people who benefit from a regular home visit from one of the Company's volunteers. The Company assesses those clients that are referred to it from doctors, families and other care agencies, then recruits, DBS checks and trains volunteers from the Wokingham Borough and surrounding area, and matches up a volunteer (Befriender) and client (Link Friend), based on location, common interests and hobbies. A regular programme of reassessment is also undertaken.

### Link Visiting Scheme

(LVS) A company limited by guarantee

### Registered charity number

1139248

### Company registration number

07349468 in England and Wales

### Registered office

The Link Visiting Scheme, The Charity and Community Hub, Waterford House, Erfstadt Court, Wokingham, RG40 2YF

### Correspondence address

The Link Visiting Scheme, The Charity and Community Hub, Waterford House, Erfstadt Court, Wokingham, RG40 2YF

### Independent examiner

Mr. T. Randall BA ACMA  
40 Oxford Road, Wokingham  
Berkshire, RG41 2XZ

### Company Secretary

Michael Roberts

### Bankers

The Co-operative Bank Plc, PO Box 200,  
Skelmersdale, WN8 6DG

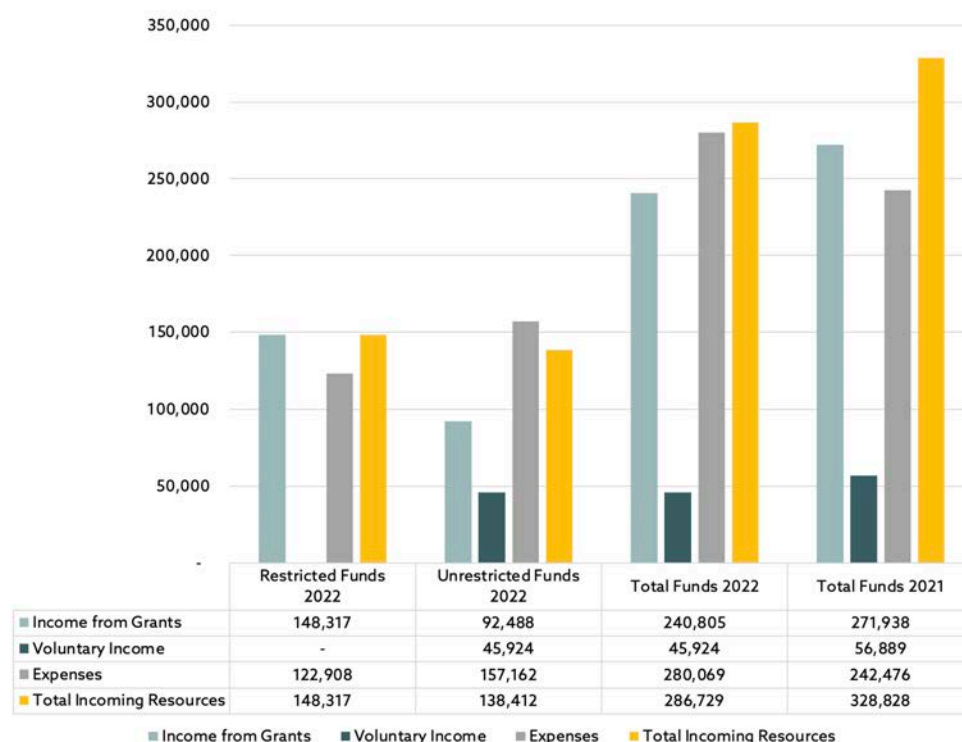


# Financial statements

## Statement of financial activities (incorporating income and expenditure account) for the year ended 31 March 2022

	Note	Restricted Funds 2022	Unrestricted Funds 2022	Total Funds 2022	Total Funds 2021
		£	£	£	£
<b>Incoming Resources</b>					
Income from Grants	2	148,317	92,488	240,805	271,938
Voluntary Income	3	-	45,924	45,924	56,889
<b>Total Incoming Resources</b>		<b>148,317</b>	<b>138,412</b>	<b>286,729</b>	<b>328,828</b>
<b>Resources Expended</b>					
Charitable Activities	4	122,908	157,162	280,069	242,476
<b>Total Resources Expended</b>	5	<b>122,908</b>	<b>157,162</b>	<b>280,069</b>	<b>242,476</b>
<b>Movement in Total Funds for the Year</b>					
- Net Income for the Year		25,409	18,750	6,659	86,352
Total Funds at 1st Ap	10	93,643	272,423	366,066	279,713
<b>Total Funds At 31st March 2022</b>		<b>119,053</b>	<b>253,673</b>	<b>372,725</b>	<b>366,065</b>

## Income and expenditure summary



## Balance sheet as of 31 March 2022

		2022		2021	
<u>Current Assets</u>		£	£	£	£
Receivables	7	8,832		18,050	
Cash at bank		<u>366,849</u>		<u>351,650</u>	
Total		375,681		369,700	
<u>Current Liabilities</u>					
Payables	8	<u>-2,957</u>		<u>-3,636</u>	
<u>Net Current Assets</u>			<u>372,723</u>		<u>366,064</u>
<u>Net Assets</u>	9		<u>372,723</u>		<u>366,064</u>
<u>Charity Funds</u>					
Restricted Funds	10		119,053		93,643
Unrestricted Funds					
- Designated Funds	10	150,000		150,000	
- General Funds	10	103,670		<u>122,421</u>	
			<u>253,670</u>		<u>272,421</u>
			<u>372,723</u>		<u>366,064</u>

The notes on pages 18 to 22 form part of these financial statements. The financial statements were approved by the Trustees on 12/12/2022 and signed on their behalf by:



**John Mallaghan**  
Trustee

**Michael Roberts**  
Trustee

## Notes to the financial statements for the year ended 31 March 2022

### 1. Accounting policies

The principal accounting policies adopted, judgements and key sources of estimation uncertainty in the preparation of the financial statements are as follows:

#### Basis of preparation

Link Visiting Scheme is a public benefit entity. The financial statements have been prepared in compliance with the Companies Act 2006, the Charities Act 2011, the Charities Statement of Recommended Practice (FRS 102), and FRS102 the Financial Reporting Standard applicable in the UK and Republic of Ireland.

The financial statements are prepared on a going concern basis. There are no material uncertainties in respect of the charity's ability to continue as a going concern for the foreseeable future, based on latest strategic plans and financial forecasts. The financial statements are prepared under the historical cost convention and on an accruals basis.

#### Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Designated funds are set aside at the discretion of the Trustees for specific purposes.

Restricted funds are funds which have been raised by the charity for particular purposes and are to be used in accordance with specific restrictions imposed by donors. The cost of raising and administering such funds are charged against the specific fund.

#### Income

All income is included in the statement of financial activities when: the charity is legally entitled to the income; the amount can be quantified with reasonable accuracy; and any performance conditions attached to the item of income have been met or are fully within the control of the charity.

Income arising from legacies is recognised when entitlement is established and the value can be measured reliably.

#### Expenditure

All expenditure is accounted for on an accruals basis and has been included under expense categories that aggregate all costs for allocation to activities. Where costs cannot be directly attributed to particular activities they have been allocated on a basis consistent with the use of the resources.

#### Estimation uncertainties

The Trustees have not made any significant judgements, estimates or assumptions about the carrying value of assets and liabilities when applying the charity's accounting policies.

## 2. Income from grants

We acknowledge and extend a heartfelt thanks to the following organisations who kindly supported The Link Visiting Scheme during the reporting period.

- Albert Hunt Trust
- Aviva Community Fund
- Barkham Parish Council
- Berkshire Community Foundation
- Berkshire NHS Trust
- Bucks Healthcare NHS Trust
- Charvil Parish Council
- Earley Town Council
- Ecclesiastical Movement for Good
- Edward Gostling Foundation
- Englefield Charitable Trust
- February Foundation
- Finchampstead Parish Council
- Francis Winham Foundation
- Garfield Weston Foundation
- Groundwork UK
- Haines Hill Charitable Trust
- Hurst Parish Council
- Masonic Charitable Foundation
- Morris Beneficent Fund
- National Lottery Community Fund
- Shanly Foundation
- Shinfield Parish Council
- Sonning Parish Council
- Tatiana Korsicova
- Wargrave Parish Council
- WG Edwards Charitable Foundation
- Winnersh Parish Council
- Wokingham Borough Council
- Wokingham Town Council
- Wokingham United Charities
- Wokingham Without Parish Council
- Woodley Town Council

## 3. Voluntary income

	<b>Restricted Funds 2022 £</b>	<b>Unrestricted Funds 2022 £</b>	<b>Total Funds 2022 £</b>	<b>Total Funds 2021 £</b>
Donations		<b>42,648</b>	<b>42,648</b>	55,638
Income from charitable activities		<b>2,829</b>	<b>2,829</b>	272
Fundraising		<b>447</b>	<b>447</b>	979
	-	<b>45,924</b>	<b>45,924</b>	56,889
Legacy income income			-	-
<b>Total voluntary Income</b>	-	<b>45,924</b>	<b>45,924</b>	56,889



## 4. Analysis of expenditure

### Summary

	<b>2022</b>	<b>2021</b>	<b>Difference</b>
Staff costs	<b>212,111</b>	<b>169,802</b>	<b>42,309</b>
Office costs	<b>29,920</b>	<b>25,522</b>	<b>4,398</b>
Other costs	<b>38,039</b>	<b>47,151</b>	<b>-9,112</b>
<b>Total</b>	<b>280,070</b>	<b>242,475</b>	<b>37,595</b>

### 4.1 Staff costs

	<b>Total 2022 £</b>	<b>Total 2021 £</b>
Wages and Salaries	<b>200,734</b>	160,274
Social Security Costs	<b>11,377</b>	9,529
	<b>212,111</b>	<b>169,802</b>
Average monthly number of part time employees	<b>9</b>	<b>9</b>

### 4.2 Office costs

<b>Office Costs</b>	<b>Total 2022 £</b>	<b>Total 2021 £</b>
Telephone & IT Costs	<b>13,466</b>	12,168
Office Rent incl Elec & cleaning	<b>4,933</b>	3,662
Printing/Postage/Stationery	<b>6,519</b>	7,195
Insurance	<b>3,190</b>	536
Office/Computer Equipment	<b>1,500</b>	1,649
Payroll services	<b>312</b>	312
Other		
	<b>29,920</b>	<b>25,522</b>

### 4.3 Other costs

	Total 2022	Total 2021
	£	£
Other Costs		
Social Events and Activities for Clients	12,347	26,719
Staff Training	991	324
Recruitment	175	-
Accountancy and Consultancy Fees	19,716	12,979
Travel & Mileage	1,653	431
Volunteer Training/Expenses/Gifts	865	155
Covid related and other costs	1,647	5,428
DBS Checks	578	926
Professional Memberships	210	35
TV License	(142)	154
Other	-	-
	<u>38,040</u>	<u>47,151</u>

### 5. Transactions with trustees and key personnel

No trustee received any remuneration or fees in the current or preceding year. The daughter of the CEO received consultancy fees of £6,081 (2021: £5,988) for work in relation to website design, communications and marketing. These fees are included within "Other costs: Accountancy and consultancy" as shown in note 4.3.

### 6. Tangible fixed assets

There are no tangible fixed assets. The Company expense all individual capital items under £500 in the period of purchase.

## Receivables, payables and funds

### 7. Receivables

	2022	2021
	£	£
Prepayment and Accrued income	8,832	3,999
	<u>8,832</u>	<u>3,999</u>

### 8. Payables – current liabilities

Social security and other taxes £2,957 (2021 £3,636)

## 9. Net assets by fund

	Restricted Funds		Unrestricted Funds		Total Funds	
	Restricted	Designated	General	Total		
	£	£	£	£	£	£
31st March 2022						
Receivables			8832	8832	8832	8832
Cash at Bank	119053	150000	97798	247798	366851	366851
Payables			-2957	-2957	-2957	-2957
Net Assets	119053	150000	103673	253673	372725	372725

## 10. Net movement in funds

	Restricted Funds	Unrestricted Funds			Total Funds
	Restricted	Designated	General	Total	
	£	£	£	£	£
Balance at 31st March 2021	93643	150000	122422	272423	366066
Income	148317	0	138412	138412	286729
Expenditure	-122908	0	-157162	-157162	-280070
Transfer between funds	0	0	0	0	0
Balance as at 31st March 2022	119053	150000	103673	253673	372725