

# Annual Report

A Year of Growth at The Link Visiting Scheme

2022 / 2023

  
the **Link**  
visiting scheme



# Contents

|   |    |
|---|----|
| Introduction: The issue of loneliness ..... | 1  |
| Improving social wellbeing .....            | 3  |
| Our mission .....                           | 4  |
| Our highlights .....                        | 10 |
| Looking ahead .....                         | 17 |
| Our community .....                         | 20 |
| Chair's statement .....                     | 29 |
| Financial review .....                      | 30 |
| Trustees' report .....                      | 32 |
| Independent Examiner's report .....         | 33 |
| Reference and administrative details .....  | 34 |
| Financial statements .....                  | 36 |

## The problem

Prolonged loneliness is considered by many to be one of the largest public health challenges we face. 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 (1).

Specific life circumstances can make older people vulnerable to loneliness, like retirement, being widowed, and being socially isolated. (2) According to Age UK, people aged 50+ living in England are 5.5 times more likely to be lonely if they don't have someone to open up to when they need to (3).

**Over 30,000 residents of Wokingham Borough are 65+, with around 8,000 living alone. These numbers are predicted to continue to rise substantially (4).**

Our work serves a public benefit as not only does social isolation cause immense suffering for those affected, but it also places great pressure on families, carers, health, and social services.

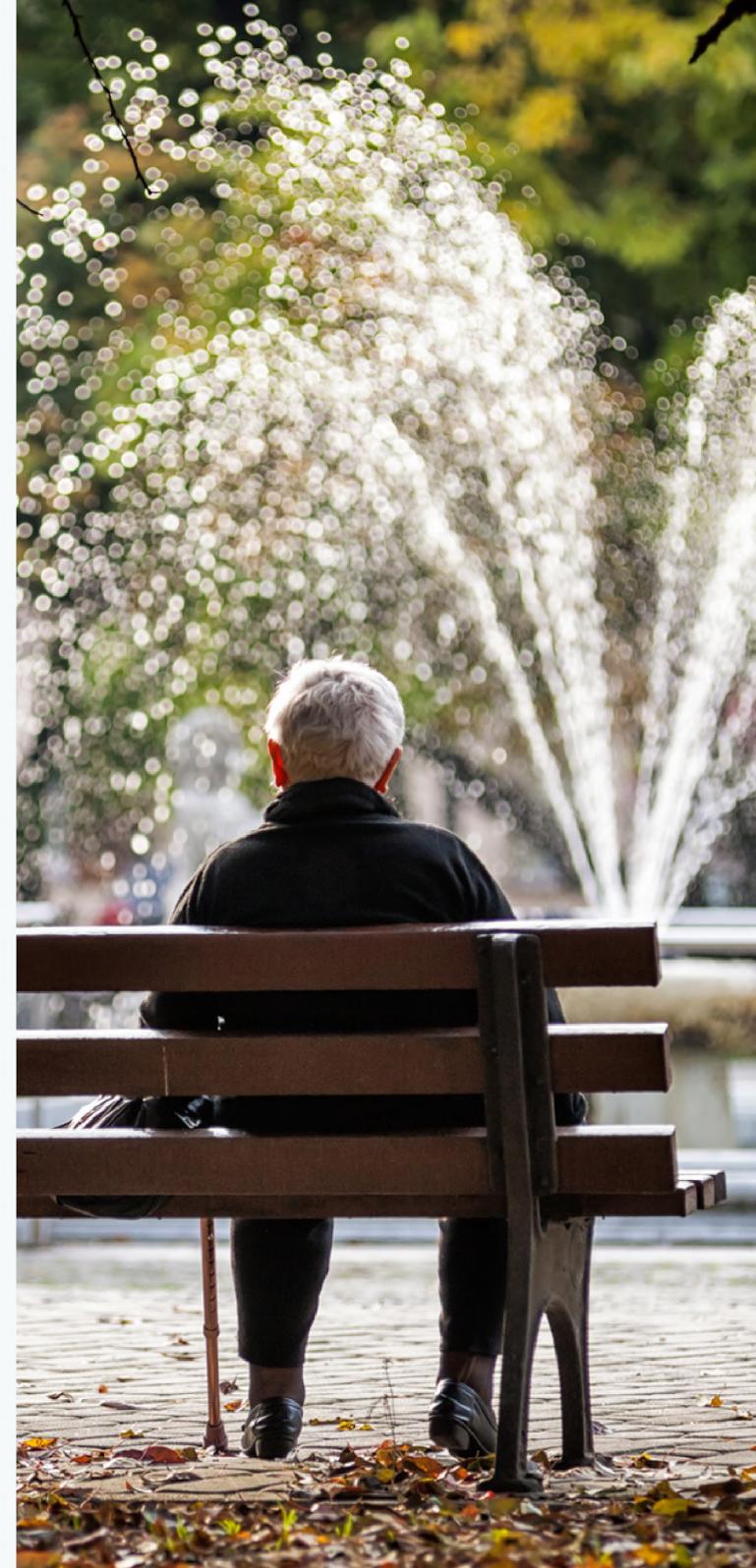


A new survey of 1,334 health professionals working in GP surgeries in the UK revealed more than a quarter of health professionals (27%) believe their time and NHS resources are majorly drained by treating lonely people.

Nearly a third (32%) confessed they regularly see patients who come to them because they are just lonely.

Minister for Mental Health and Women's Health Strategy, Maria Caulfield said: "Picking up the phone and chatting to a friendly voice can make the world of difference to someone experiencing loneliness, and I applaud those coming forward to volunteer their time."

References (1) Campaign to End Loneliness | (2) Marmalade Trust | (3) Victor, C. 'Loneliness in older age: the UK perspective' in Age UK Oxfordshire (2011) | (4) The Census 2021 recorded the population aged 65 and above in Wokingham Borough was about 30,500. The Census 2021 also recorded 7,677 one-person households aged 66 years or over, accounting for 11.1% of all households in the borough, or 47.2% among one-person households."



## How we improve social wellbeing

The Link Visiting Scheme was founded 25 years ago to help reduce loneliness amongst older people and to bring generations together in friendship and shared experiences. We have seen thousands of lives transformed, and we continue to reach hundreds of older people through our work every year.

Social well-being is essential for overall health and quality of life. We meet older people at a point in their lives where building and maintaining meaningful relationships, nurturing social connections and seeking out positive interactions becomes difficult if not impossible. This could be due to reduced mental health, chronic health conditions, lack of transport or a general sense of loss including the bereavement of a loved family member.

Through our assessment process, matching and linking up with volunteers, and providing opportunities to connect to local community activities or group activities we have organised in-house, we are able to help older people begin the journey of building individual connections, relationships and interactions.

**These are all crucial to contributing to improved wellbeing, where friendship can act as a buffer against stress, provide a renewed sense of purpose, build resilience, improve cognitive function and combat the serious impact of loneliness.**



## OUR MISSION

The Link Visiting Scheme is a charity reducing loneliness and isolation, enabling friendships and improving the health, wellbeing and independence of our Link Friends. We celebrate and honour older people in our community and help them to have fun!

## Our specialist pathway

When someone comes to the Link, there are many options open to them and their personal circumstances and we are delighted to see an increase in the number of Link-Ups. 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 see the transformative impact of our work daily and receive wonderful feedback from our Link Friends who consistently rate our services highly (99.6% rating us as good or excellent in our last survey) and allow us to assess their social wellbeing regularly. This year we achieved 208 Link Ups. An 8% increase on the previous year!

## From loneliness to social integration



### Prevention

The Friendship Alliance works to make Wokingham a vibrant, inclusive community by promoting friendship activities. This should reduce the demand on our services.

### 1:1 Friendship

Link Express offers initial temporary support, followed by a well-matched longer term regular friendship with a volunteer, typically visiting on a weekly or fortnightly basis.

### Groups

'Friendship Groups' are small local groups of Link Friends and volunteers, designed to increase social integration and self-sufficiency in various locations across the Borough.

### Activities

Community activities and Link activities and events encourage wider engagement, increase social integration and self-sufficiency with a reduced need for Link services.

# Project overview

Bringing people together is the core of all that we do. We all crave connection, no matter what our age - it's what makes life worth living. As well as one-to-one befriending and regular activities and events, we have designed and developed projects with quality connection at their heart.

## LINK ONLINE

Opening doors to digital group activities, and reducing digital inequality by providing support for Link Friends with tablet computers and individual coaching and support. To date, Link Friends have learnt to make online medical appointments, order repeat prescriptions online using the NHS app, book train travel, pay for car parking, search for services and explore interests on YouTube and Google.

## LINK TO NATURE

An ongoing seasonal project designed to re-awaken an interest in nature, enrich friendships and improve wellbeing. Including regular outings, gifts of pot plants to nurture and grow, events and special interest talks.

## ACTIVE MINDS

Specifically designed for those experiencing symptoms of cognitive impairment, our group sessions allow individuals to grow in confidence, do cognitive exercises and make new friends.

## KEEPING IN TOUCH

Designed to establish communication and provide support for our existing Link Friends who may be at risk of escalating needs.

## FRIENDSHIP GROUPS

Regular get-togethers with small groups of Link Friends and volunteers, encouraging connection with a wider social circle in a supportive setting.

## COMMUNITY KITCHEN

Bringing together Link Friends and volunteers of all ages to prepare, cook and eat delicious food together on a Sunday afternoon once a month.

## CHAIR YOGA

A six-week course to help older people to get moving again with gentle exercise to improve flexibility and wellbeing.

## Activities and events

Alongside our projects, we have put together a programme of group activities with the aim of providing regular social interaction, peer support and create a sense of belonging. Group activities are facilitated by a coordinator who enables the group to share experiences, interests and stories with others in order to foster that sense of connection and common ground.

Routine and structure to the week have consistently been voiced as dramatically improving wellbeing. Many of our group activities include some physical warm-up, mental stimulation and most importantly an opportunity to laugh, have fun and enjoy that feel-good factor!

**"Your dedication to making a positive impact in our community is truly admirable, and we are honoured to be a part of your journey."**

Owners of The Dog and Duck (An activity venue in Emmbrook)



## Our friends told us

Activities and events like Pie and Pint, indoor and outdoor Bowls, Crafts and Coffee, and Quiz and Singalong foster camaraderie and joy, creating meaningful connections and cherished memories.

These experiences enrich their lives by promoting social interaction, fun, and a sense of belonging.

### CELIA AND COMMUNITY KITCHEN

"I just wanted to say a huge thank you to you and all the volunteers - mum had a lovely time at Community Kitchen and loved the 'old music' - she was in great form that evening and kept saying how much she enjoyed it. A huge thanks to you all again for giving your time, it's hugely appreciated."

### BRIAN AND LINK ONLINE

**Brian not only loves his classical music; he is also an avid reader of the classics. He wanted to know if he could get a hard copy of George Eliot's Middlemarch. By searching on Google, Brian has found that his local Waterstones have a copy. Google is fast becoming Brian's best friend.**

### JOHN AND ACTIVE MINDS

**"Joining the Link and doing Active Minds has reminded me that there is life after 90."**

### JEAN AND LINK TO NATURE

I have joined Link to Nature and really enjoyed the visit to the local gardens, which was such a change from the life I usually lead the past three years. The four walls have disappeared."

### ALBERT AND PIE AND PINT

Albert joined Link Visiting as he was missing interactions with people his own age. He attended Pie and Pint and sat with Anne and Betty. They got on famously, and now meet up regularly. He brings them to all of our activities, and he says that the charity has given him back his purpose in life.

### ANNETTE AND PIE AND PINT

"I give The Link 10/10. I was going through a really rough patch and I was basically a recluse, I didn't go out anywhere. It was a case of The Link or nothing - they've helped me through a very bad patch."

# Volunteers

This year we have recruited, inducted, trained and supported 80 volunteers with a current volunteer base of 414 volunteers. Throughout the year we have supported 480 volunteers with 66 leaving the charity due to moving away, change in circumstances or poor health. 25% reduction on the previous year (88).

Volunteers join us for a number of reasons, from wanting to make a direct impact on the lives of older people to a desire to feel more connected in the community themselves as we provide a platform to make friends, socialise and contribute to our organisation and the wider community. Volunteers enjoy the personalised way we include them, working together to find the right time and day that suits them and working to maximise their interests, skills and abilities.

All volunteers are interviewed, DBS checked, references are collected and then they attend mandatory induction and safeguarding training. Only then do we match them with an older person or engage them in community activities.

**This year our volunteers provided a huge 47,160 hours of service, transforming lives through quality time, focused attention and mutual friendship.**

As a direct result of our continued efforts to attract, support and retain volunteers, we are directly investing in our 'volunteer team' and look forward to adding a new p/time Volunteer Co-ordinator to the team.



**Our satisfaction ratings are consistently 99% positive with an 'excellent or good' rating.**

"If you're thinking of volunteering in a way that directly benefits your community and some of the most rewarding and deserving individuals in it, Link Visiting is about as good as it gets".

## OUR HIGHLIGHTS

This year we were delighted to receive prestigious awards that underscore our dedication to reducing loneliness through friendship and to the impressive growth we've achieved.

## 2022 at a glance

TOTAL VOLUNTEERS GIVING THEIR TIME:

**480**

TOTAL LINK FRIENDS SUPPORTED:

**607**

TOTAL VOLUNTARY HOURS SPENT:

**47,160**

PERCENTAGE OF LINK FRIENDS WHO  
RATED OUR SERVICE 'EXCELLENT'

**84%**



## A year of growth

As of March 31 2023, our client base stood at an impressive count of 550, showcasing a remarkable increase of 15.5% from the preceding year's tally of 476 clients, as of March 31 2022. Simultaneously, our volunteer network exhibited a growth of 4.3%, reaching a total of 414 volunteers by March 31 2023, compared to the 397 volunteers recorded on the same date in 2022. Remarkably, a significant 73.4% of our volunteers actively participate in our 1:1 befriending initiative, signifying a noteworthy 2.1% increase compared to the previous year's engagement.

Our expansion has been notably pronounced in several regions within the Wokingham Borough, most notably in Earley, Wokingham, and Woodley. As our organisational presence expands, so does our active contribution towards reducing, delaying and preventing the need for social services across the Borough. We remain acutely aware of the perpetual strain on the resources of the Borough's adult services and endeavour to play a pivotal role in reducing their burden.

**The most astonishing development, over the span of the past three years, lies in the volume of referrals,**



**which has surged by a staggering 75.2% since the end of 2020 representing an extraordinary growth trajectory. Managing this growth in demand without undermining the quality of our services, or the well-being of our Link Friends, staff or volunteers will be the biggest challenge we face in the coming years.**

As is custom and practice, we have clients and volunteers moving through the Link on a regular basis and it is important to capture and understand the reasons why. We saw an 11% increase in client leavers and a 25% decrease in volunteer leavers in the past 12 months. Our projects, activities and events are more in demand than ever, with us having to restrict access to some of the most popular ones. This year we restarted 10 regular group activities which saw a staggering 258 individual activities taking place with over 2,000 attendees.

## Awards

We have a unique understanding, not only of the root causes and impacts of loneliness but also of 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. We have been nationally recognised by receiving the Queen's Award for Voluntary Service, the highest award given to volunteer groups across the UK.

In addition, we have received three local awards this year:

1. Berkshire's High Sheriff chose the theme 'unsung heroes' and wanted to award Link volunteers, with special recognition for the Link Online project volunteers.
2. An award from Wokingham Borough's Mayor in recognition for outstanding commitment and contribution. Nominator Lucy Zeal DL said: "I am nominating the Link Visiting Scheme for the outstanding contribution they make to the Wokingham Borough community. I feel the hard work of their staff, volunteers and trustees deserves to be recognised."
3. A Level 5 Outstanding 'It's Your Neighbourhood Award' with the Royal Horticultural Society and Thames and Chilterns in Bloom. Our partnership with Wokingham In Bloom and Wokingham Horticultural Society also contributed to winning a Wokingham In Bloom Gold award with our Link to Nature project funded by the National Lottery.



## Christmas

For those who are separated from their families, have lost loved ones, or don't have strong social networks, the emphasis on spending time with family and friends during Christmas can highlight their feelings of loneliness. Christmas can amplify feelings of grief and intensify sadness and memories of loss.

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 for 12 years running. This year, we offered a hybrid event with home deliveries to those alone and housebound and a group celebration for those who were able.

**We supported over 100 people with a team of 55 volunteers.**

This included a small team of professional chefs who worked hard to ensure we all enjoyed a Christmas day to remember. This event is of equal importance to volunteers and older people and a lifeline for all.



## The Friendship Alliance

The Link assumed stewardship of the Friendship Alliance in April 2022 and works in partnership with Involve Community Services, Age UK Berkshire and Wokingham Volunteer Centre, funded by Wokingham Borough Council. 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 in 2019. Alliance partners operate independently, continuing to deliver services as discrete charities.

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

**“Thank you Jayne for all you’re doing to raise awareness of these lovely groups, they are providing such important support.”**



the Link  
visiting scheme



Berkshire  
age UK



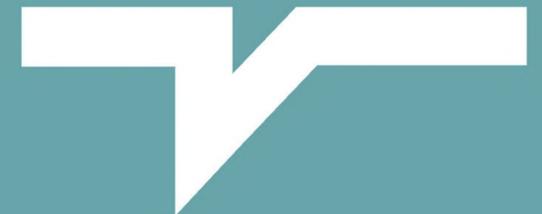
involve  
MAKING A DIFFERENCE LOCALLY  
IN BRACKNELL FOREST & WOKINGHAM BOROUGH



Wokingham Volunteer  
Centre

# Friendship Alliance

PROMOTING FRIENDSHIP IN WOKINGHAM BOROUGH



# The Friendship Alliance

Our stewardship of the Friendship Alliance, led by Project Manager, Jayne Streak, has also provided opportunities to engage across the Borough and be more collaborative. This has facilitated a more harmonised approach to communicating the Link and its key services.

**This year we have seen impressive growth, with Friendship Tables increasing by 53% and Friendship Champions increasing by 51.8%.**

## Management

Setting the direction and ensuring objectives are met

**The Link Visiting Scheme**

## Prevention

Making Wokingham a vibrant, inclusive community by promoting friendship

**Friendship Alliance**

## Signposting

Offering effective advice on support available for people who are lonely / isolated

**Age UK Berkshire  
Involve**

## Befriending

Long term, 1:1 personalised friendship services

**The Link Visiting Scheme**

## Activities

Groups and events designed to bring the community together

**The Link Visiting Scheme  
Wokingham Volunteer  
Centre, Involve**

## LOOKING AHEAD

Outlining the varied and exciting plans to improve and broaden the services which support our community in the year ahead.

## Looking ahead

We were profoundly touched to receive a legacy donation of £150,000 in 2017 bequeathed to us by one of our Link Friends, William Ian Hamilton. This heartfelt contribution exemplifies the appreciation and trust that Mr Hamilton had for our service.

Although delayed in our plans by Covid-19 and the subsequent increased demand and growth of our service, we are now able to leverage this donation to make a lasting and meaningful difference in combatting social isolation.

### **We will further enhance our offer of support and expand our reach in several different ways, including**

➡ Launch a weekly 'Friendship Centre' (Link Thursdays at Space for All, hosted at All Saints Church) where those facing the painful impact of loneliness have a warm and welcoming space to go. Connections will be proactively facilitated, and information and practical support is given about activities, groups, clubs or organisations of interest and to find out about a broad range of services that will help connections such as transport options.

➡ Improve our reach to ethnically diverse communities and faith groups ensuring our service offer is accessible to all. We know that 87% of residents in the Borough are White, with 13% from ethnic minority backgrounds. 92% aged 50+ are White therefore a key objective for 2023-24 is to reach out to minority groups across Wokingham Borough with the purpose of broadening the Link's ethnic and cultural diversity. We will do this through collaboration and friendship with the Aisha Mosque, the Ramgarhia Sabha Sikh Centre and our involvement with the Inclusion and Equality Forum.

➡ Enable and improve access to transport options for our service users

➡ Encourage those who are housebound by providing 'Wellbeing Bags' full of helpful activities, treats, information and support options.

➡ Improve wellbeing, and boost confidence and mood through the use of assisted animal therapy.

- ➔ Manage growth and demand with more effective working with our Friendship Alliance project including starting 'Connection Sessions' which aim to introduce our newest Link Friends to community activities already functioning in the area where they live.
- ➔ Enable and facilitate ambitious trips out for those who rarely have this opportunity
- ➔ Celebrate together to mark our 25th anniversary

Utilising this bequest effectively will help us bring comfort, friendship and renewed hope to many more individuals in the years to come and we honour the memory and legacy of Mr Hamilton in an impactful way.

**We are also keen to:**

- ➔ Focus on men's loneliness through our work with Wokingham Borough Council's Social Isolation and Loneliness Group
- ➔ Broaden our fundraising initiatives by diversifying our strategies including emphasis on corporate and local business sponsorship, individual donations and focusing on a more sustainable plan which will help us transition from post-emergency funding from the Covid-19 pandemic to more long-term financial stability.



## OUR COMMUNITY

We're constantly inspired by our community of passionate supporters, fundraisers, referrers and partners. In 2023, they grew stronger than ever. When more partners are actively involved we can achieve greater goals and make a larger positive change.

## Our team and our trustees

**Our team is comprised of 17 highly skilled, passionate and hard-working people who are committed to transforming lives with friendship.**

A rise of 54% from the previous year of 11 team members. This wide-ranging group draws upon learnings from a variety of industries and backgrounds with one shared goal - to bring life-enhancing social connections to older people and volunteers in Wokingham Borough.

In this year, we were thrilled to welcome six new team members including a: Activities Coordinator, Keeping In Touch Befriending Officer, Core Services Administrator, Fundraising Manager, Friendship Alliance Administrator and Befriending Officer. We also continue to work with 5 contractors who help us with specialist support and manage the changing demand for our service. In total, we have 9.4 full-time equivalents a rise of 70% from the previous year of 5.5 full-time equivalents.

Our growth story owes a significant debt to the invaluable contributions of our diverse and dedicated trustees. Hailing from varied backgrounds including large global corporations, national and small charities, and the NHS, their collective expertise forms a dynamic tapestry that drives the success of our organisation.

John Mallaghan: Chair, Tony Sweet: Finance Trustee, Laura Mitchell, Gayle Manicom, Kuldip Athwal



## Our partners

Our Keeping In Touch project engages with older people who have escalating needs. This year we made 255 signposts to organisations in the borough to prevent the risk of crisis.

We are members of the Dementia Partnership along with Age UK Berkshire and Understanding Dementia to deliver a varied programme of activities and support for people living with dementia and their carers.

We received 403 referrals. A 75.2% increase from the financial year end of 2020 to the financial year end of 2023.

We are members of the Public Health-led Social Isolation and Loneliness Group (SiL).

We are key partners in the Voluntary Sector Action Group - a group formed out of the Covid-19 pandemic, composed of key voluntary sector partners and decision-makers in Wokingham Borough Council, led by Director of Public Health, Ingrid Slade.



## Our partners told us

### **AMANDA CRACKNELL, SOCIAL PRESCRIBER**

"The Link is an absolute lifeline to a number of our patients. As a social prescriber, I am often supporting people who are lonely and isolated, and The Link is the perfect service to refer them to. The feedback I receive is always positive, and I know of many true friendships that have been formed. The impact on their health and wellbeing is evident. The Link also hosts a number of events that bring volunteers and clients together to share in some uplifting social fun. Their Christmas lunch delivery event on Christmas Day brought so much joy to those who wouldn't have seen anyone, it was so heartwarming!"

### **NIKKI STEWART, SENIOR SOCIAL WORKER (LOCUM), WOKINGHAM BOROUGH COUNCIL**

"I have referred to The Link on numerous occasions; it is a valuable resource in the Wokingham area. It provides people in the community opportunities for engagement, which minimises social isolation. The Link serves to improve wellbeing by having a peer they can rely on for a regular friendly chat."

### **LEWIS WILLING, HEAD OF HEALTH AND SOCIAL CARE INTEGRATION, BERKSHIRE WEST CCG & WOKINGHAM BOROUGH COUNCIL**

"As a Council, we continue to value the work done by the Link Visiting Scheme. They are key partners to support with our Friendship Alliance (for those that are at risk of social isolation) and our Keeping In Touch project, which was a finalist in the national Municipal Journal Awards this year. On top of these services that the council commission there are many invaluable interactions to keep people active in their communities and involved in, build or grow their networks. "

## Corporate support

We work with generous organisations who choose to support The Link Visiting Scheme. They stand by us in countless ways - from raising awareness to supporting our team, to generously funding projects in our community.

**"The Link Visiting Scheme is an excellent charity that does amazing work throughout the local community. It is life-changing for so many people and makes a real difference. Congratulations to everyone at The Charity and the fantastic volunteers" - Mike Lotus, Consultant**

**"The FSP Foundation Committee were blown away by the amazing work The Link does in the local community. It is clear that the work they do in confronting loneliness in older people is invaluable." - Hannah Sims, Associate - Family**



## Our fundraisers

Our fundraisers have done some amazing things to raise money for The Link Visiting Scheme. In 2022, fundraisers planned marathons and skydiving, hosted golf days and baked cakes – all to raise money for their community.

### **GRAEME MARSH - HEAD OF FOUNDATION, MCCARTHY STONE FOUNDATION**

"The McCarthy Stone Foundation is proud to work with The Link Visiting Scheme, who provide front line support for older people experiencing social isolation in the Wokingham area. Our foundation seeks out local, grassroots organisations who are embedded in their local community, supported by volunteers, and are helping older people to feel valued, connected and engaged to others, and The Link is a perfect example of this. Through the use of unrestricted funding, we trust the team at The Link to know where their need is the greatest and help ensure they can sustain the vitally important parts of the charity that are often hardest to fundraise for. Crucially, we can do so with the confidence that The Link will deliver on their objectives and meet the rising needs of older people in their community."

### **CO-OP LOCAL COMMUNITY FUND**

"We proudly support groups such as the Link Visiting Scheme as they are making a difference to local families supporting their physical and mental wellbeing, providing access to opportunities to learn new skills and providing food parcels where needed. Their project also looks at continued skills and training new volunteers to support the befriending service."

### **ANDREW OUGHTON - EDMUND GODSON CHARITY TRUSTEE**

"The Edmund Godson Charity is delighted to be able to support The Link Visiting Scheme, whose friendship based service provides such comfort to the lonely and isolated people that live in Wokingham & the surrounding villages."

# Our Link Friends

## RELIEVING STRESS AND PRESSURE THROUGH SOCIAL CONNECTION

Bob is 93 and has a diagnosis of dementia. He lives with his wife, who is his sole carer. Bob and Carol were used to living a very active and full life, walking clubs, yoga, art groups, singing and performing, and both musicians.

After Bob's diagnosis and reduced mobility, life became hard for them both, with Bob becoming frustrated and withdrawn which caused Carol to feel stressed and tired.

At the assessment, we referred Carol for a carer's assessment and Bob for a needs assessment. We arranged for Bob to have a weekly befriender to take him for a walk and consequently give Carol some much-needed respite. Bob was also interested in attending our Active Minds course. An 8-week course to improve cognitive function, have fun and make friends. Although reluctant initially both accepted that it would be beneficial for Bob to socialise and find new tools to help his memory.

**Bob attended each session. He sang for the group, and Carol says: "He seems like a new man!"**

He made a friend, Alan, who he now meets up with at a Link Coffee Morning. And Carol meets with Alan's wife, as they are both carers and support each other.

"Joining The Link and doing Active Minds has reminded me that there's life after 90!"

Active Minds covered mindfulness and Bob now meditates daily and Carol reminds him to practice breathing exercises when he feels stressed or agitated. Carol told us: "I've been overwhelmed by the support we've received. Bob enjoys his volunteer visitor and I feel like I've got a bit of free time. I want to give back for all the help we've received and I am looking into volunteering.

**Everything feels more manageable now we know we have people to call on when life gets tough".**

\*names have been changed to protect anonymity

## Our Link Friends

### KEEPING CONNECTIONS THROUGH LINK ONLINE

Sheila is one of our Link Friends in her late 90s and has enjoyed a close and supportive friendship with her neighbour for many years. Sheila was anxious and low when her neighbour moved away adding to her feelings of loss. Through individual coaching and support and via the loan of a tablet computer, we were able to set her up with a WhatsApp account. Not only does Sheila enjoy the company of her Link Online volunteer but she is now able to continue her friendship with her beloved neighbour using WhatsApp to message and talk & video conference as well as exchanging photos.

**"It's made a big difference to me as now we can keep in touch. I didn't think I would use a computer but it's not as difficult as I thought. Thank you to my patient volunteer!"**

\*names have been changed to protect anonymity



## Our volunteers told us

### NATALIE

"This is a fantastic scheme offering support to the local community. It offers Margaret more social activity and has enriched my life by listening to her stories and being in her company. Thank you! I'm so pleased I signed up!"

### SARAH

"Have always found help when I needed it and the team has always without fail responded. Thank you. 'So very glad I decided to volunteer. Enjoy my Link visits and meet-ups with new people. Thank you. Feel I have benefited so much from my association with Jill."

### CHRIS

"I have had nothing but great experiences with The Link Visiting Scheme so far, from the communication and training to my pairing with Val as we get on great together and have lots to talk about. It was been a really rewarding and enriching experience for me, I'm so glad I volunteered. Thank you!"

### FLORENCE

"I very much enjoy spending time with Betty and having a good chat, often at her home but sometimes at her local pub or at the park nearby. I get just as much out of it as Betty does. I usually take my 1-year-old son and they love seeing each other."

### SAM

"I just love going to see Pam, she is always so positive and happy. We laugh lots and time just fly's by. When I leave I'm already excited to see her again."

### ALEX

"The Link has grown substantially over the last few years and does a superb job of enriching the lives of lonely elderly people. Long may you continue!!"

### AMANDA

"You are very supportive & definitely have the person's best interests at heart. Very caring."

## A message from our chair

22/23 has been a challenging year, but one where everyone involved – staff, trustees, supporters and particularly our wonderful volunteer family - can feel so proud of the outcomes we have achieved together!

As we enter our 25th year of confronting loneliness in Wokingham Borough, demand for our services continues to grow substantially. The impact of social isolation on individuals' physical health and mental wellbeing, and the drain this has on NHS and social care resources is now well understood. Thankfully, the huge role played by the charity in helping delay, reduce and avoid the need for many of the most vulnerable in the community to require access to these more expensive services is also more widely recognised. On behalf of the Trustee Board, I would like to thank all who have supported us in the last year, with particular thanks for the continuing support of our key strategic partner Wokingham Borough Council.

The continued growth in demand has been reflected in the increased resources required by the charity, without impacting the quality of our services. We have seen a net increase in Link Friends of over 15% during the year, and although we sadly saw some experienced staff members move on to other opportunities, we exit the year with a wonderful, motivated

team who continue to bring so much meaning, friendship, and fun to the lives of our Link Friends.

Managing demand and growth will be our number 1 challenge in the coming years. Staff hours have risen by 70% in the last year, which has a major impact on our fundraising requirements. One result of our success can be seen in the huge increase in new referrals – since 2020 these have risen by 75%, which results in a huge drain on staff resources. Successfully managing growth will also require trustees help in strengthening the stewardship of key partners and supporters, evolving to more sustainable, longer term fundraising strategies and helping the CEO where required on operational issues and volunteer recruitment.

On behalf of all trustees, I want to offer huge thanks to our CEO Marjie Walker and her team - staff and volunteers - for the incalculable difference they make every day to the lives of our Link Friends. As an active volunteer I am constantly inspired, and humbled, by how much our Link Friends appreciate what we do for them, and to see first hand the smiles and laughter you will find at any of our activities. Thanks to all of you from the people who really matter – our Link Friends – for making a difference.



**JOHN MALLAGHAN**  
**CHAIR OF TRUSTEES**

# Financial review

## OVERVIEW

Recognition across Wokingham Borough of the positive outcomes we deliver to some of the most vulnerable in our community has continued to grow and, as a result, in the year 2022-23 the cost of our charitable activities increased significantly. Our total expenditure for 2022-23 was £363,365, an increase of 30% compared to £280,069 in the previous year.

This recognition is however also reflected in our income last year which at £432,917 was an increase of 51% over £286,728 in 2021-22. This not only more than covered the year's expenditure but contributed to the underlying financial strength which allows us to deliver quality services to an ever-growing client base.

## INCOME

Total income for the year, excluding amounts we receive on behalf of and for onward payment to other organisations, was £432,917, (2022: £286,728), analysed as follows:

|                           | 2023           | 2022           |
|---------------------------|----------------|----------------|
| Donations                 | 48,141         | 42,541         |
| Grants                    | 375,896        | 240,805        |
| Fundraising activities    | 7,810          | 3,275          |
| Interest income and other | 1,070          | 107            |
| <b>Total</b>              | <b>432,917</b> | <b>286,728</b> |

The total income for 2023 represents an increase of 56% over last year.

We work very closely with Wokingham Borough Council (WBC) in providing our services to local residents, and during 2022-23 we were delighted to secure additional funding from this key strategic partner when we assumed stewardship of the Friendship Alliance in April 2022. Operational costs of the Alliance are funded by WBC, which draws on the expertise of a number of charitable organisations, greatly increasing our ability to address the needs of socially isolated people within the borough. WBC continued to be our largest single source of funding, contributing around two-thirds of our income from donations and grants (2022: 57%).

We received donations and grants from a further 32 organisations (2022: 46 organisations) which reflects the significant efforts of our team to meet our fundraising target. We are most grateful for every single donation received, all of which go towards enabling us to continue our work. A list of donors can be found in Note 4. Our own fundraising events and activities contributed £7,810 (2022: £3,275).

The majority of our income continues to be classified as restricted, ie income which the donor directs be applied to specific activities. This is particularly the case for most of our grant income. However, it is important to emphasise that such is the nature of how our donors identify with the aims of Link Visiting that in practice any restrictions can be accommodated within our core activities.

## EXPENDITURE

Our expenditure on charitable activities for 2022-23 increased by 30% compared to the previous year. The largest increase was in staff costs which rose by 30% to £276,724 from £212,111 in the previous year.

The key reasons for this increase were:

- The significant growth in our activities has only been possible by increasing the number of people responsible for delivering our services. In 2022 – 23 we welcomed six new members to our team and they joined us at various times during the year. This expansion accounted for substantially all of the increase in staff costs, including related employment expenses such as social security and pension.
- Direct project costs increased as a function of the increase in activities during the year.
- Increases in other overhead costs similarly reflect increased activity levels and higher staff numbers, as well as the inflationary pressures on general services.

### FINANCIAL POSITION

Net assets increased from £372,725 on 31st March 2022 to £442,276 on 31st March 2023. Cash resources as at the same date have increased from £366,849 to £462,757.

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 consider these, this remains under review. At the present time, longer-term investment is inappropriate.

### RESERVES

The net surplus for the year of £69,551 has been added to total funds meaning that these have increased to £442,276 at 31 March 2023 (31 March 2022: £372,725).

Restricted funds at the beginning of the year were £119,052 and following a detailed analysis performed during the year it was established that this amount could be reduced. As a result, the required level of restricted funds at 31 March 2023 is £20,215.

Unrestricted funds at 31 March 2023 are £422,061 (31 March 2022: £253,673). Following receipt of a large one-off legacy, the trustees resolved in 2019 to designate £150,000 of unrestricted funds for a major project, the details of which to be decided. These plans have been delayed by factors such as the COVID-19 pandemic but remain under review.

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 provide a contingency for emergencies and other unforeseen expenditures.

To help mitigate the risks faced from rapid growth in demand and costs, and the prevailing uncertainties in the economic outlook, trustees have resolved that our target is to maintain unrestricted reserves of 50% of our current annual budget; this may be varied if circumstances indicate this is appropriate.

On 31 March 2023, general funds were £272,061 which equates to 75% of the total expenditure incurred in the year then ended and around 60% of our expenditure plans for 2023/24. This is higher than the trustees' ongoing policy target of 50% but that policy also recognises that the actual level of reserves will be subject to short-term fluctuation according to circumstances. The trustees are satisfied that this level of funds is sufficient and appropriate to meet the charity's ongoing activities for the time being.

### RISK MANAGEMENT

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.

# 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 22 November 2023 and signed on their behalf by:



**John Mallaghan**  
Trustee



**Antony Sweet**  
Trustee

# Independent Examiner's report

I report to the charity trustees on my examination of the accounts The Link Visiting Scheme for the period to 31st March 2023 set out on pages 37 to 43.

## Respective responsibilities of trustees and examiner

As the charity's Trustees of The Link Visiting Scheme (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of The Link Visiting Scheme are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

## Independent examiner's statement

Since Link Visiting Scheme gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a fellow member of the Association of Charity Independent Examiners, which is one of the listed bodies.

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

1. accounting records were not kept in respect of The Link Visiting Scheme as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities [applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)].

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.

## K Gomes MAAT FCIE

Independent Examiners Ltd  
Unit 2, The Broadfields Business  
Centre Delling Lane  
Bosham  
PO18 8NF

Signed:  Date: 06/12/2023

# Reference and administrative details

## GOVERNING DOCUMENT

Memorandum and Articles of Association incorporated 18 August 2010.

## OBJECTIVES AND ACTIVITIES

Our mission is outlined in the 'About us' section of the Impact Report on pages 1 to 9. Over 1,000 Link Friends have benefited from our services over since the charity was established. We aim to give their lives more purpose and joy, enabling them to integrate into the community and build new, lasting friendships.

## 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.

## PUBLIC BENEFIT

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.

## 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 Kuldip Athwal (Appointed 23 October 2022)

Mr Antony Sweet (Appointed 1 April 2023)

Mr Michael Roberts resigned as a trustee on 22 March 2023.

A trustee and a director of the company are the same. 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.

## **OTHER INFORMATION**

Link Visiting Scheme - a company limited by guarantee and registered in England and Wales

Registered charity number: 1139248

Company registration number: 07349468

Registered office: The Link Visiting Scheme, The Charity and Community Hub, Waterford House, Erftstadt Court, Wokingham, RG40 2YF

Correspondence address: The Link Visiting Scheme, The Charity and Community Hub, Waterford House, Erftstadt Court, Wokingham, RG40 2YF

Independent examiner: K Gomes MAAT FCIE, Independent Examiners Ltd, Unit 2, The Broadfields Business Centre Delling Lane, Bosham, PO18 8NF

Company Secretary: Mr Kuldip Athwal

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

## FINANCIAL STATEMENTS

Thanks to the hard work and generosity of so many, 2022 was our most impactful year yet.

We were able to raise more money, grow our team, expand our reach in the community and support even more people in our community.

## THE LINK VISITING SCHEME

### STATEMENT OF FINANCIAL ACTIVITIES FOR THE FINANCIAL YEAR ENDED 31 MARCH 2023

|  | Notes | Unrestricted<br>Funds<br>£ | Restricted<br>Funds<br>£ | TOTAL<br><b>2023</b><br>£ | TOTAL<br><b>2022</b><br>£ |
|--|-------|----------------------------|--------------------------|---------------------------|---------------------------|
| <b>Income and Endowments from:</b>     |       |                            |                          |                           |                           |
| Donations and Legacies                 | 2a    | 170,421                    | 254,092                  | 424,513                   | 283,346                   |
| Charitable Activities                  | 2b    | 7,810                      | -                        | 7,810                     | 3,275                     |
| Investments                            | 2c    | 594                        | -                        | 594                       | 107                       |
|  |       | <b>178,825</b>             | <b>254,092</b>           | <b>432,917</b>            | <b>286,728</b>            |
| Funding for Other Charities            | 2a(1) | -                          | 48,450                   | 48,450                    | -                         |
| <b>TOTAL</b>                           |       | <b>178,825</b>             | <b>302,542</b>           | <b>481,367</b>            | <b>286,728</b>            |
| <b>Expenditure on:</b>                 |       |                            |                          |                           |                           |
| Direct Costs                           | 3a    | 1,462                      | 293,425                  | 294,887                   | 224,456                   |
| Charitable Activities                  | 3b    | 8,975                      | 59,504                   | 68,479                    | 55,613                    |
|  |       | <b>10,437</b>              | <b>352,929</b>           | <b>363,366</b>            | <b>280,069</b>            |
| Funding Transferred to Other Charities | 3a(1) | -                          | 48,450                   | 48,450                    | -                         |
| <b>TOTAL</b>                           |       | <b>10,437</b>              | <b>401,379</b>           | <b>411,816</b>            | <b>280,069</b>            |
| <b>NET INCOME/(EXPENDITURE)</b>        |       | 168,388                    | (98,837)                 | 69,551                    | 6,659                     |
| <b>NET MOVEMENT IN FUNDS</b>           |       | <b>168,388</b>             | <b>(98,837)</b>          | <b>69,551</b>             | <b>6,659</b>              |
| <b>RECONCILIATION OF FUNDS:</b>        |       |                            |                          |                           |                           |
| Total Funds Brought Forward            |       | <b>253,673</b>             | <b>119,052</b>           | <b>372,725</b>            | <b>366,066</b>            |
| <b>TOTAL FUNDS CARRIED FORWARD</b>     |       | <b>422,061</b>             | <b>20,215</b>            | <b>442,276</b>            | <b>372,725</b>            |

All of the organisation's operations are classed as continuing.

The notes on pages 39 to 43 form part of these financial statements.

## THE LINK VISITING SCHEME

### BALANCE SHEET

Company Registration Number :07349468

AS AT 31 March 2023

|   | Note | Unrestricted<br>Funds<br>£ | Restricted<br>Funds<br>£ | 31-Mar-23<br>Total<br>£ | 31-Mar-22<br>Total<br>£ |
|---|------|----------------------------|--------------------------|-------------------------|-------------------------|
| <b>Fixed Assets</b>                                   |      |                            |                          |                         |                         |
| Tangible assets                                       | 8    | -                          | -                        | -                       | -                       |
| <b>Current Assets</b>                                 |      |                            |                          |                         |                         |
| Debtors   | 9    | 326                        | -                        | 326                     | 8,832                   |
| Cash at bank and in hand                              | 10   | 442,542                    | 20,215                   | 462,757                 | 366,849                 |
| <b>Total Current Assets</b>                           |      | <b>442,868</b>             | <b>20,215</b>            | <b>463,083</b>          | <b>375,681</b>          |
| <b>Creditors:</b> amounts falling due within one year | 11   | 20,807                     | -                        | 20,807                  | 2,957                   |
| <b>NET CURRENT ASSETS</b>                             |      | 422,061                    | 20,215                   | 442,276                 | 372,725                 |
| <b>TOTAL ASSETS</b> less current liabilities          |      | <b>422,061</b>             | <b>20,215</b>            | <b>442,276</b>          | <b>372,725</b>          |
| <b>NET ASSETS</b>                                     |      | <b>422,061</b>             | <b>20,215</b>            | <b>442,276</b>          | <b>372,725</b>          |
| <b>Funds</b>  |      |                            |                          |                         |                         |
| General Funds   | 5.3  | 272,061                    | -                        | 272,061                 | 103,673                 |
| Restricted Funds                                      | 5.4  | -                          | 20,215                   | 20,215                  | 119,052                 |
| Designated  | 5.3  | 150,000                    | -                        | 150,000                 | 150,000                 |
| <b>Total Funds</b>                                    |      | <b>422,061</b>             | <b>20,215</b>            | <b>442,276</b>          | <b>372,725</b>          |

The company's financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The Trustees consider that the company is entitled to exemption from the requirement to have an audit under the provisions of section 477 of the Companies Act 2006 ("the Act") and members have not required the company to obtain an audit for the year in question in accordance with section 476 of the Act.

The Trustees acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The financial statements were approved and authorised for issue by the Trustees on 22nd November 2023 and signed on their behalf by:

Print Name : ANTONY SWEET

Signature: 

## THE LINK VISITING SCHEME

### NOTES TO THE FINANCIAL STATEMENTS FOR THE FINANCIAL YEAR ENDED 31 MARCH 2023

#### 1. ACCOUNTING POLICIES

The principal accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all the years presented, unless otherwise stated.

##### Statement of compliance

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019) - (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102). They also comply with the Companies Act 2006 and Charities Act 2011.

##### Basis of preparation

The Link Visiting Scheme meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy notes.

##### Going concern

The trustees consider that there are no material uncertainties about the charity's ability to continue as a going concern nor any significant areas of uncertainty that affect the carrying value of assets held by the charity.

##### Income and endowments

All income is recognised once the charity has entitlement to the income, it is probable that the income will be received and the amount of the income receivable can be measured reliably.

##### Donations and legacies

Donations are recognised when the charity has been notified in writing of both the amount and settlement date. In the event that a donation is subject to conditions that require a level of performance by the charity before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those conditions is wholly within the control of the charity and it is probable that these conditions will be fulfilled in the reporting period.

Legacy gifts are recognised on a case by case basis following the grant of probate when the administrator/executor for the estate has communicated in writing both the amount and settlement date. In the event that the gift is in the form of an asset other than cash or a financial asset traded on a recognised stock exchange, recognition is subject to the value of the gift being reliably measurable with a degree of reasonable accuracy and the title to the asset having been transferred to the charity.

##### Deferred income

Deferred income represents amounts received for future periods and is released to incoming resources in the period for which, it has been received. Such income is only deferred when:

- The donor specifies that the grant or donation must only be used in future accounting periods; or
- The donor has imposed conditions which must be met before the charity has unconditional entitlement.

##### Gift aid

Incoming resources from tax reclaims are included in the Statement of Financial Activities at the same time as the gift to which they relate.

##### Interest receivable

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity; this is normally upon notification of the interest paid or payable by the institution with whom the funds are deposited.

##### Expenditure

All expenditure is recognised once there is a legal or constructive obligation to that expenditure, it is probable settlement is required and the amount can be measured reliably. All costs are allocated to the applicable expenditure heading that aggregate similar costs to that category.

##### Charitable activities

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities and services for its beneficiaries. It includes both costs that can be allocated directly to such activities and those costs of an indirect nature necessary

##### Taxation

The charity is considered to pass the tests set out in Paragraph 1 Schedule 6 of the Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes. Accordingly, the charity is potentially exempt from taxation in respect of income or capital gains received within categories covered by Chapter 3 Part 11 of the Corporation Tax Act 2010 or Section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

## THE LINK VISITING SCHEME

### NOTES TO THE FINANCIAL STATEMENTS (continued) FOR THE FINANCIAL YEAR ENDED 31 MARCH 2023

#### Tangible fixed assets

The company does not currently have any fixed assets.

#### Debtors

Trade and other debtors are recognised at the settlement amount after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

#### Cash and cash equivalents

Cash and cash equivalents comprise cash on hand and call deposits, and other short-term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

#### Liabilities

Liabilities are recognised when there is an obligation at the Balance sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably.

Liabilities are recognised at the amount that the company anticipates it will pay to settle the debt or the amount it has received as advanced payments for the goods or services it must provide.

#### Pensions and other post retirement obligations

The charity operates a defined contribution pension scheme, which is a pension plan under which fixed contributions are paid into a pension fund and the charity has no legal or constructive obligation to pay further contributions, even if the fund does not hold sufficient assets to pay all employees the benefits relating to employee service in the current and prior periods.

| 2. ANALYSIS OF INCOME                        | Unrestricted<br>Funds<br>£ | Restricted<br>Funds<br>£ | TOTAL<br>2023<br>£    | TOTAL<br>2022<br>£    |
|--|----------------------------|--------------------------|-----------------------|-----------------------|
| <b>a) Donations and Legacies</b>             |                            |                          |                       |                       |
| Donations                                    | 48,141                     | -                        | 48,141                | 42,541                |
| Grants                                       | 121,804                    | 254,092                  | 375,896               | 240,805               |
| Other Income                                 | 476                        | -                        | 476                   | -                     |
|  | <u>170,421</u>             | <u>254,092</u>           | <u>424,513</u>        | <u>283,346</u>        |
| <b>a1) Grant Funding for Other Charities</b> |                            |                          |                       |                       |
| Funding transferred to Other Charities       | -                          | 48,450                   | 48,450                | -                     |
|  | <u><b>170,421</b></u>      | <u><b>302,542</b></u>    | <u><b>472,963</b></u> | <u><b>283,346</b></u> |
| <b>b) Charitable Activities</b>              |                            |                          |                       |                       |
| Events                                       | 3,522                      | -                        | 3,522                 | 2,828                 |
| Fundraising                                  | 4,288                      | -                        | 4,288                 | 447                   |
|  | <u><b>7,810</b></u>        | <u><b>-</b></u>          | <u><b>7,810</b></u>   | <u><b>3,275</b></u>   |
| <b>c) Investment Income</b>                  |                            |                          |                       |                       |
| Interest Received                            | 594                        | -                        | 594                   | 107                   |
|  | <u><b>594</b></u>          | <u><b>-</b></u>          | <u><b>594</b></u>     | <u><b>107</b></u>     |

## THE LINK VISITING SCHEME

### NOTES TO THE FINANCIAL STATEMENTS (continued) FOR THE FINANCIAL YEAR ENDED 31 MARCH 2023

| <b>3. ANALYSIS OF EXPENDITURE</b> |     | Unrestricted<br>Funds      | Restricted<br>Funds      | TOTAL<br>2023      | TOTAL<br>2022      |
|-----------------------------------|-----|----------------------------|--------------------------|--------------------|--------------------|
| Note                              |     | £                          | £                        | £                  | £                  |
| <b>a) Direct Costs</b>            |     |                            |                          |                    |                    |
|                                   |     | 1,462                      | -                        | 1,462              | 100                |
|                                   | 5.3 | -                          | 16,701                   | 16,701             | 12,245             |
|                                   | 6   | -                          | 276,724                  | 276,724            | 212,111            |
|                                   |     | <b>1,462</b>               | <b>293,425</b>           | <b>294,887</b>     | <b>224,456</b>     |
| <b>a1) Direct Costs</b>           |     |                            |                          |                    |                    |
|                                   | 5   | -                          | 48,450                   | 48,450             | -                  |
|                                   |     | <b>1,462</b>               | <b>341,875</b>           | <b>343,337</b>     | <b>224,456</b>     |
| <b>b) Charitable Activities</b>   |     |                            |                          |                    |                    |
| Note                              |     | Unrestricted<br>Funds<br>£ | Restricted<br>Funds<br>£ | TOTAL<br>2023<br>£ | TOTAL<br>2022<br>£ |
|                                   | 5.3 | 3,940                      | 9,600                    | 13,540             | 9,696              |
|                                   | 5.3 | -                          | 728                      | 728                | 578                |
|                                   | 5.3 | -                          | -                        | -                  | 1,647              |
|                                   |     | 2,040                      | -                        | 2,040              | 3,939              |
|                                   |     | 1,527                      | -                        | 1,527              | 3,190              |
|                                   | 5.3 | -                          | 4,692                    | 4,692              | 6,081              |
|                                   |     | -                          | -                        | -                  | 1,500              |
|                                   |     | 313                        | -                        | 313                | 312                |
|                                   | 5.3 | -                          | 7,667                    | 7,667              | 6,519              |
|                                   |     | 219                        | -                        | 219                | 210                |
|                                   |     | 299                        | -                        | 299                | 175                |
|                                   | 5.3 | -                          | 5,434                    | 5,434              | 4,933              |
|                                   | 5.3 | -                          | 3,447                    | 3,447              | -                  |
|                                   | 5.3 | -                          | 1,495                    | 1,495              | 991                |
|                                   | 5.3 | 637                        | 350                      | 987                | -                  |
|                                   | 5.3 | -                          | 18,894                   | 18,894             | 13,324             |
|                                   | 5.3 | -                          | 6,232                    | 6,232              | 1,653              |
|                                   | 5.3 | -                          | 965                      | 965                | 865                |
|                                   |     | <b>8,975</b>               | <b>59,504</b>            | <b>68,479</b>      | <b>55,613</b>      |

#### 4. Income from Grants and Donations

We acknowledge and extend a heartfelt thanks to the following organisations who kindly supported The Link Visiting Scheme during the year ended March 2023 :

|                                       |  |
|---------------------------------------|--|
| Arborfield and Newland Parish Council | Berkshire Community Foundation                       |
| Barkham Parish Council                | Bucks Healthcare NHS Trust                           |
| Charvil Parish Council                | Easthampstead Rotary Club                            |
| Earley Town Council                   | Edward Gostling Foundation                           |
| Finchampstead Parish Council          | Field Seymour Parkes Foundation                      |
| Hurst Parish Council                  | Haines Hill Charitable Trust                         |
| Shinfield Parish Council              | Hedley Foundation                                    |
| Sonning Parish Council                | Invesco Cares Foundation                             |
| Spencers Wood & Grazeley PCC          | Masonic Charitable Foundation                        |
| Swallowfield Parish Council           | McCarthy Stone Foundation                            |
| Wokingham Borough Council             | Mobbs Memorial Trust                                 |
| Winnersh Parish Council               | Shanly Foundation                                    |
| Wokingham Town Council                | Sir Jules Thorn Charitable Trust                     |
| Wokingham Without Parish Council      | Syder Foundation                                     |
| Woodley Town Council                  | The Englefield Charitable Trust                      |
| Wokingham United Charities            | The February Foundation                              |
| 52 Lives                              | The Morris Beneficent Fund                           |
| Arnold Clark Community Fund           | The National Lottery Community Fund (Link to Nature) |
| Aviva Charity Foundation              | The Persimmon Charitable Foundation                  |
| Barchester Charitable Foundation      |  |

## THE LINK VISITING SCHEME

### NOTES TO THE FINANCIAL STATEMENTS (continued) FOR THE FINANCIAL YEAR ENDED 31 MARCH 2023

| <b>5.1 Designated Funds<br/>Current Year</b> | Balance<br>1.4.22<br>£ | Income<br>£ | Expenditure<br>£ | General<br>Transfer<br>£ | Balance<br>31.3.23<br>£ |
|--|------------------------|-------------|------------------|--------------------------|-------------------------|
| Designated Funds                             | 150,000                | -           | -                | -                        | 150,000                 |
|  | <u>150,000</u>         | <u>-</u>    | <u>-</u>         | <u>-</u>                 | <u>150,000</u>          |

The Trustees have approved spend in the year ending March 2024 of £75,000 from the £150,000 designated fund bequeaths in 2017. Further funds may be approved for release during the year depending on progress on other projects.

| <b>5.2 General Funds</b>  | Balance<br>1.4.22<br>£ | Income<br>£           | Expenditure<br>£     | General<br>Transfer<br>£ | Balance<br>31.3.23<br>£ |
|---------------------------|------------------------|-----------------------|----------------------|--------------------------|-------------------------|
| General Funds             | 103,673                | 178,825               | 10,437               | -                        | 272,061                 |
|                           | <u>103,673</u>         | <u>178,825</u>        | <u>10,437</u>        | <u>-</u>                 | <u>272,061</u>          |
| <b>Total Unrestricted</b> | <b><u>253,673</u></b>  | <b><u>178,825</u></b> | <b><u>10,437</u></b> | <b><u>-</u></b>          | <b><u>422,061</u></b>   |

| <b>5.3 Restricted Funds</b>      | Balance<br>1.4.22<br>£ | Income<br>£           | Expenditure<br>£      | General<br>Transfer<br>£ | Balance<br>31.3.23<br>£ |
|----------------------------------|------------------------|-----------------------|-----------------------|--------------------------|-------------------------|
| <i>Restricted Funds</i>          |                        |                       |                       |                          |                         |
| Christmas                        | 5,793                  | 19,000                | 19,704                | -                        | 5,089                   |
| Core Activities                  | 4,748                  | 500                   | 18,138                | 12,890                   | -                       |
| Friends for Ages                 | 2,890                  | -                     | -                     | (2,890)                  | -                       |
| Community Kitchen                | 9,885                  | 7,619                 | 4,984                 | (10,000)                 | 2,520                   |
| Friendship Groups                | 9,588                  | 4,800                 | 13,188                | -                        | 1,200                   |
| Link to Nature                   | 13,931                 | 19,175                | 24,503                | -                        | 8,603                   |
| Re-Integration                   | -                      | 10,031                | 10,031                | -                        | -                       |
| Pathway                          | 7,500                  | 1,400                 | 8,900                 | -                        | -                       |
| Winter                           | -                      | 3,500                 | 3,500                 | -                        | -                       |
| Befriending                      | -                      | 10,148                | 7,345                 | -                        | 2,803                   |
| Computers                        | -                      | 2,632                 | 2,632                 | -                        | -                       |
|                                  | <u>54,335</u>          | <u>78,805</u>         | <u>112,925</u>        | <u>-</u>                 | <u>20,215</u>           |
| <i>Wokingham Borough Council</i> |                        |                       |                       |                          |                         |
| Friendship Alliance              | 63,918                 | 167,504               | 231,422               | -                        | -                       |
| Active Minds                     | 799                    | 20,233                | 21,032                | -                        | -                       |
| Keeping in Touch                 | -                      | 36,000                | 36,000                | -                        | -                       |
|                                  | <u>64,717</u>          | <u>223,737</u>        | <u>288,454</u>        | <u>-</u>                 | <u>-</u>                |
|                                  | <b><u>119,052</u></b>  | <b><u>302,542</u></b> | <b><u>401,379</u></b> | <b><u>-</u></b>          | <b><u>20,215</u></b>    |
| <b>Total Funds 2023</b>          | <b><u>372,725</u></b>  | <b><u>481,367</u></b> | <b><u>411,816</u></b> | <b><u>-</u></b>          | <b><u>442,276</u></b>   |

| <b>Prior Year</b>         | Balance<br>1.4.21<br>£ | Income<br>£           | Expenditure<br>£      | General<br>Transfer<br>£ | Balance<br>31.3.22<br>£ |
|---------------------------|------------------------|-----------------------|-----------------------|--------------------------|-------------------------|
| Designated Funds          | 150,000                | -                     | -                     | -                        | 150,000                 |
| General Funds             | 122,422                | 138,412               | 157,161               | -                        | 103,673                 |
| <b>Total Unrestricted</b> | <b><u>272,422</u></b>  | <b><u>138,412</u></b> | <b><u>157,161</u></b> | <b><u>-</u></b>          | <b><u>253,673</u></b>   |
| <b>Restricted Funds</b>   | <b><u>93,643</u></b>   | <b><u>148,317</u></b> | <b><u>122,908</u></b> | <b><u>-</u></b>          | <b><u>119,052</u></b>   |
| <b>Total Funds 2022</b>   | <b><u>366,065</u></b>  | <b><u>286,729</u></b> | <b><u>280,069</u></b> | <b><u>-</u></b>          | <b><u>372,725</u></b>   |

## THE LINK VISITING SCHEME

### NOTES TO THE FINANCIAL STATEMENTS (continued) FOR THE FINANCIAL YEAR ENDED 31 MARCH 2023

| 6. STAFF COSTS AND NUMBERS          | <b>2023</b>    | <b>2022</b>    |
|-------------------------------------|----------------|----------------|
|                                     | £              | £              |
| Gross Wages and Salaries            | 254,351        | 196,371        |
| Employer's National Insurance Costs | 16,892         | 11,377         |
| Pension Contributions               | 5,481          | 4,363          |
|                                     | <b>276,724</b> | <b>212,111</b> |
|                                     | <b>276,724</b> | <b>212,111</b> |

The average number of persons employed during the year was as follows: 12                      9

#### 7. TRUSTEES' REMUNERATION AND EXPENSES

No trustee received any remuneration or fees in the current or preceding year. The daughter of the CEO received consultancy fees of £4,692 (2022: £6,081) for work in relation to website design, communications and marketing.

#### 8. TANGIBLE FIXED ASSETS

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

#### 9. DEBTORS AND PREPAYMENTS

|         | Unrestricted<br>Fund<br>£ | Restricted<br>Fund<br>£ | <b>Total<br/>2023<br/>£</b> | <b>Total<br/>2022<br/>£</b> |
|---------|---------------------------|-------------------------|-----------------------------|-----------------------------|
| Debtors | 326                       | -                       | 326                         | 8,832                       |
|         | <b>326</b>                | -                       | <b>326</b>                  | <b>8,832</b>                |
|         | <b>326</b>                | -                       | <b>326</b>                  | <b>8,832</b>                |

#### 10. CASH AT BANK AND IN HAND

|                          | Unrestricted<br>Fund<br>£ | Restricted<br>Fund<br>£ | <b>2023<br/>Total<br/>£</b> | <b>2022<br/>£</b> |
|--------------------------|---------------------------|-------------------------|-----------------------------|-------------------|
| Cash at bank and on hand | 442,542                   | 20,215                  | 462,757                     | 366,849           |
| Total                    | 442,542                   | 20,215                  | 462,757                     | 366,849           |
|                          | 442,542                   | 20,215                  | 462,757                     | 366,849           |

#### 11. CREDITORS AND ACCRUALS: AMOUNTS FALLING DUE WITHIN ONE YEAR

|                                    | Unrestricted<br>Fund<br>£ | Restricted<br>Fund<br>£ | <b>Total<br/>2023<br/>£</b> | <b>Total<br/>2022<br/>£</b> |
|------------------------------------|---------------------------|-------------------------|-----------------------------|-----------------------------|
| Creditors                          | 13,375                    | -                       | 13,375                      | 2,957                       |
| Other Taxation and Social Security | 5,392                     | -                       | 5,392                       | -                           |
| Other Creditors                    | 2,040                     | -                       | 2,040                       | -                           |
|                                    | <b>20,807</b>             | -                       | <b>20,807</b>               | <b>2,957</b>                |
|                                    | <b>20,807</b>             | -                       | <b>20,807</b>               | <b>2,957</b>                |

