

**DULWICH HELPLINE**  
**(A company limited by guarantee)**  
**REPORT AND FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 MARCH 2011**

WEDNESDAY



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14/12/2011  
COMPANIES HOUSE

**Company Registration Number: 05189161**  
**Charity Registration Number: 1105923**

# ***Dulwich Helpline***

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## **DULWICH HELPLINE**

### **LEGAL AND ADMINISTRATIVE INFORMATION**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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##### **Trustees:-**

- |                            |  |
|----------------------------|--|
| • Edward Salmon            | Chair                                  |
| • Katharine St John-Brooks | Vice Chair                             |
| • Michael Merrifield       | Secretary                              |
| • Myra Chapman             | Treasurer                              |
| • Edmund Kaye              |  |
| • Patricia Smith           |  |
| • Kirsty Gould             |  |
| • Aro Nylander             |  |
| • Patricia Cox             |  |
| • An Chi Chen              |  |
| • Nicholas Merriman QC     | Co-opted 27 <sup>th</sup> January 2011 |

**Company Registered Number**  
05189161

**Charity Registered Number**  
1105923

**Registered Office**  
Dulwich Community Hospital, East Dulwich Grove, London SE22 8PT

**Director**  
Barbara Scott

**Independent Examiner**  
Kevin Lally, Knox Cropper, Chartered Accountants, 8/9 Well Court, London EC4M 9DN

**Bankers**  
CAF Bank Ltd, 25 Kings Hill Avenue, Kings Hill, West Malling, Kent ME19 4JQ

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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The Trustees, who are also directors of the charity for the purposes of the Companies Act, submit their annual report and the audited financial statements of Dulwich Helpline (the company) for the year ended 31 March 2011. The Trustees confirm that the annual report and financial statements of the company comply with current statutory requirements, the requirements of the company's governing documents and the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" issued in March 2005.

### **STRUCTURE AND GOVERNANCE**

#### **Constitutional and organisational structure**

Dulwich Helpline was founded in 1993 as a trust. The incorporated charity started to operate on 1 April 2005 and the unincorporated charity was closed. The charity is constituted as a company limited by guarantee, and is therefore governed by its memorandum and Articles of Association. It is a registered charity, number 1105923, and a registered company, number 05189161. Legal responsibility for the management and stewardship of the charity is vested in the Board of Trustees.

The members of the charity are eligible to elect directors/Trustees, and to put forward and vote on resolutions at the Annual General Meeting (AGM). The membership is composed of Trustees and those volunteers, service users and supporters of the organisation who elect to become members.

The charity has no subsidiaries or formal ties with other organisations but this could change during the 2011/12 financial year.

The management of the charity is the responsibility of the Board of Trustees who are elected or co-opted under the terms of the Articles of Association. The Board of Trustees in consultation with the Director and staff make strategic decisions; the Director attends all board meetings and other staff members are also invited to attend. The Director and staff take operational decisions.

#### **Staff**

At the end of the year there were 2 full-time and 6 part-time staff -

**Director** - Barbara Scott, part-time

#### **Project Co-ordinators -**

- Sandra Arnold, full-time
- Bethany Holtum (formerly Rockliffe), full-time
- Sue Yeomans, part-time

**Volunteer Co-ordinator** - Jean Hedden, part-time

**Administrator/Fundraiser** - Caroline Dunmall, part-time

**Estate Support Worker** - Jackie Barber, part-time

**Bookkeeper** - Michelle Sinclair, part-time

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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##### **Recruitment and appointment of Trustees**

The Articles of Association provide that, at each AGM, one third of the Trustees (or the number nearest to one third) must retire from office: those who have been in office longest retire first. Retiring Trustees may normally put themselves forward for re-election by the members of the charity. The maximum time a Trustee may serve is nine years (with effect from the 2006 AGM) though a Trustee will be eligible for reappointment after a two-year break. A succession plan is reviewed by the board annually.

Trustees are recruited both from the members of the charity and from the wider local community. During this year we have recruited one new Trustee, Nicholas Merriman QC, who was co-opted onto the board on 27/01/2011. Trustees bring experience in the public and voluntary sectors, management, finance and care of older people. Volunteers and service users are represented on the Board of Trustees.

The Trustees meet at least six times a year and more frequently when necessary. The Board of Trustees has two sub-committees, finance and fundraising, which meet regularly throughout the year. The sub-committees work within agreed terms of reference and report to the Board of Trustees. In addition, a group has met to consider partnership possibilities.

##### **Induction and training of Trustees**

The induction programme for new Trustees includes

- written information on Dulwich Helpline's activities,
- a meeting with the Chair and the Director,
- a half day in the office to meet staff and ask questions;
- an invitation to attend Dulwich Helpline's activities in the community,
- attendance at a Board of Trustees meeting.

Information from the Southwark Trustees Network which aims to educate and inform Trustees about their responsibilities and raise their understanding of good practice in governance is circulated to Trustees. Training courses run by Community Action Southwark (formerly Southwark Community Care Forum) and Southwark Council are open to all Trustees.

## **OBJECTIVES AND ACTIVITIES**

##### **Summary of objectives**

The principal object of Dulwich Helpline is to assist in the relief of need, hardship and distress within areas of South London as determined by the Board of Trustees.

##### **Vision**

Dulwich Helpline's vision is an enrichment of the local community in which older people feel respected, supported and a part of the life going on around them, a community which recognises that older people can make a valuable contribution and in which people of all ages are enabled to get to know and help one another.

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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##### **Mission statement**

Dulwich Helpline aims to improve the quality of life and help to prevent physical and mental deterioration of isolated older people in south Southwark by running volunteer projects designed to combat loneliness, provide emotional and practical support and enable older people to continue to live in their own homes

##### **Core values**

In practical terms, these objectives require Dulwich Helpline staff, working with volunteers, to

- provide isolated older people with the practical and emotional support they need, both in the long term and at times of crisis,
- involve service users in the design and delivery of our services and, where possible, encourage them to act as volunteers,
- integrate service users into the wider community and local networks

##### **PUBLIC BENEFIT**

The Charity Commission now requires all charities to consider and report on public benefit. Dulwich Helpline, along with other charities, has to show that the aims and charitable activities are demonstrably for the public benefit. The level of detail reported should be proportionate to the size and financial turnover of the charity.

The activities of Dulwich Helpline demonstrate their public benefit by offering services to older people (over the age of 60) living within a defined geographical area. Dulwich Helpline's services are open to all. People are assessed when they are referred or contact Dulwich Helpline. If they are interested in using the services we offer and we can reasonably hope to assist them, we discuss the range of services we can offer. We recognise that in order to benefit from our services and to assist with the activities of normal life we may have to facilitate access by providing transport.

There is no charge for our services, although many of our service users voluntarily support Dulwich Helpline through donations and becoming part of the Friends' Scheme. Our work in providing befriending, social groups, activities, assistance with travel, gardening and household tasks helps to build resilience through facilitating access to activities. Friendships and social contacts are fostered and developed. Our work can serve to reduce service users' recourse to other, publicly funded, providers of health and social care.

Our volunteers also benefit as they recognise the value of their contribution to their community. We believe this activity also builds a sense of community cohesion in the area, particularly the work we do with local schools and the level of inter-generational contact we seek to promote.

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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#### **Safeguarding Adults**

The staff and volunteers of Dulwich Helpline are committed to working in a way that protects vulnerable adults from harm. We accept our responsibilities to safeguard the well-being of all those with whom we work.

Any organisation that works with older people must be aware of the possibility that older people are vulnerable to exploitation or neglect. It is important that all staff and volunteers are alert. All of our staff have received 'alerters' training from Southwark Council in how to detect and report any concerns around safeguarding.

Our volunteers play an important role in alerting staff to any concerns that they may have about a service user, as they often have the most regular contact with the person. All our volunteers receive information about how to report any concerns in their 'welcome pack' and receive free online training.

Over the past year we have worked closely with two volunteers who have raised concerns about a person they visit. In both cases, the volunteers were concerned about the person's deterioration in health and consequently their ability to manage at home, without additional help. As in all cases of safeguarding, we alerted Southwark Council and GPs to these concerns as they are able to investigate or monitor the situation. Wherever possible, this sharing of information is done with the consent of the vulnerable person. However the duty of care overrides a situation where consent is not given. We then work together with Southwark Social Services towards a satisfactory outcome for all concerned.

#### **ORGANISATION OF WORK**

Each Co-ordinator supports a number of individual service users and is responsible for specific activity and befriending groups. The Co-ordinators, in turn, preside at a weekly referral meeting where new service users are allocated for assessment, user needs are discussed and service users are matched with appropriate volunteers.

The delivery of Dulwich Helpline services relies on volunteers and a small but committed staff team. Our Co-ordinators, Sandra Arnold, Bethany Holtum, and Sue Yeomans, assess new service users and describe the services we offer. If we are unable to help, care is taken to advise where alternative help and advice can be obtained.

To achieve its aims during 2010-11, Dulwich Helpline has undertaken a wide range of activities related to the following areas of work -

- The recruitment, training and ongoing support of volunteers,
- Service delivery;
- Fundraising,
- Organisational development.

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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#### **The recruitment and training of volunteers**

Dulwich Helpline volunteers are the lifeblood of the organisation and our work would be impossible without them. We have a large, diverse and dedicated team of volunteers who give, and receive, a great deal through their volunteering. We are deeply grateful to our volunteers for their support across the whole range of activities -

<b>Service</b>	<b>Description</b>
Befriending	Volunteers regularly visit service users, on a one-to-one basis to offer friendship and sociability to those who cannot easily get out.
Gardening	Volunteer gardeners help our service users with light gardening
Transport	Transport volunteers provide lifts to an older person, to help them keep appointments and maintain a social life.
Groups and activities	Staff and volunteers run 22 groups for older people across our local area. These include: Reading Groups, Art Appreciation, Reminiscence, and Gentle Exercise. Our Drop-in Groups also offer the opportunity for meeting other people over light refreshments for sociability and conversation. (See Appendix 1 for full group list)
Practical Help	Volunteers assist with simple practical tasks including accompanying someone on a shopping trip, reading newspapers, books or documents, and sorting small scale household maintenance e.g. changing light bulbs
Fundraising and Events	Volunteers help at our regular fundraising events.
Office Help	Volunteers come into the offices and help with administrative tasks, to assist the smooth running of the organisation

We continue to be successful in recruiting volunteers and there were 277 active volunteers during 2010-2011. This is largely due to the commitment and enthusiasm of Jean Hedden, Volunteer Co-ordinator

We also maintain links with other recruiting organisations such as Volunteer Centre Southwark. Talks are given to local organisations, and publicity leaflets are distributed widely. A complete volunteer package is in place to provide support to volunteers and staff are always available to discuss any difficulties which may arise



## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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Our approach to the recruitment of volunteers is to offer individual, as opposed to group, sessions for people interested in volunteering. Over this year, we have had sufficient trained volunteers to cover all areas of activity

<b>Volunteer Statistics</b>	<b>2010-11</b>
Number of volunteers over the whole year <sup>1</sup>	277
Volunteers recruited	58
Volunteers left	27
Befriending volunteers, a subset of the total	77
Volunteers undergoing the assessment process	19

In order to replenish our supply of high quality volunteers Dulwich Helpline has to maintain a clear profile in the local community. Our Volunteer Co-ordinator, Jean Hedden, has attended 14 local events during the year. This activity increases the number of people who see material about our work and the opportunities for volunteering. These events have proved to be a useful source of new volunteers.

#### **New Activities**

During 2010-11 we have maintained the level of services and added some new work. We have made a major effort to improve the accuracy of our 'tasks' statistics.

As well as achieving incremental growth in our core activities, we have tried to be innovative and have sought new partners in order to draw in new service users and volunteers and to develop new activities. We are also pleased to continue working with our previous partners. A full list of these can be found in Appendix 5.

In 2009 we embarked upon outreach work on the Sydenham Hill and Lordship Lane estates, in order to recruit new service users and volunteers. This had a slow start, but these efforts have culminated this year, in the formation of a very successful lunch and conversation group at Olley's Fish and Chip restaurant (see Appendix 1). This meets fortnightly and has been entirely defined by the wishes of the participants and volunteers.

Our intergenerational work with local schools has gone from strength to strength as we have this year started working with both of the state schools in the area, Charter and Kingsdale, in addition to our long-term relationships with the three Alleyn Foundation schools. See Appendix 2 for a fuller report and Appendix 4 for a case study on

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<sup>1</sup> This is the total number of volunteers over the year, regardless of when they joined or left us. Please note, this number does not include students who we work with within their school, which for 2010-11 amounts to around 55 students, from 5 schools.

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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intergenerational work. We now work with all the local senior schools and hope to expand on links with the primary schools also over the next year following successes this year at Dulwich Village Infant's School

#### **Challenges**

The winter was particularly cold and snowy and this affected the total number of groups we ran. The inclement weather might have been a factor in the high level of winter deaths, mirroring the picture of the previous year. All deaths are a source of sadness for the service users, volunteers and staff, many of whom have had very long relationships.

In looking forward to the future it is likely that the funding support we have had from the Local Authority and the PCT will diminish in the case of one and disappear entirely for the other. We have taken steps this year to meet this financial challenge and plan for the future.

- Looking at measurement of wellbeing of individuals at the point they join Dulwich Helpline and then again after around 4 months. We hope this measurement of outcome will help convince all our funders that preventative services help to sustain people and postpone the point at which they need higher level services.
- Looking for potential collaborative partners with similar aims to our own and to consider sharing our premises and services with a view to saving money.
- Trying to bolster any shortfall in funding by applying to additional foundations and grant giving trusts, but we will be competing with many other organisations in a similar position.
- Continuing to fundraise locally and to recruit to our Friends' scheme.

#### **Organisational Development**

Throughout the year we have improved a number of our internal systems, in order to streamline our communications and make good progress in assuring the quality of our operations.

- All staff had appraisals and supervision,
- All staff undertook some training or development,
- We improved the accessibility of our financial reporting for Trustees by showing trends over time,
- We continue to communicate with volunteers, service users and a wider audience through the circulation of the quarterly Dulwich Helpline Herald newsletter;
- We held a successful teambuilding day to help staff consider how we manage the challenges ahead, facilitated by Peter Gluckman.

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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##### **Service user Involvement: -**

##### **Encouraging service users to act as volunteers**

Service users, once they have gained confidence within the groups often become 'user-volunteers' through phoning other participants with the schedule of group meetings, helping with refreshments or sharing and cascading particular skills acquired through a lifetime of experience, be it drawing or music appreciation. Other service users become Trustees or host groups in their own homes.

##### **Group evaluations**

The 22 groups run this year differed in both their make up and activities. Their dependence on central support also varied. We consider that it is important to monitor and evaluate their progress and to this end a new cycle of evaluation focus groups are underway, undertaken by volunteer Anne Sullivan.

##### **Achievements and Performance**

We believe we are providing a useful service to older people and the opportunities we provide make a serious contribution to helping people stay in touch with their communities thereby reducing their isolation. There is a growing body of evidence which suggests that ongoing social contact helps to maintain independence and significantly contributes to good mental health. All our services are outreach, building stronger communities through partnership with sheltered housing schemes, local schools, GP surgeries and other local community groups and organisations. We are increasingly working with local schools, thereby promoting inter-generational contact. See Appendix 2 for a report on the intergenerational work throughout the year.

Our volunteers enable service users to be in contact with local people, to attend local shops, restaurants/pubs, events, and to travel to appointments. The groups that we run enable service users to keep contact and develop friendships with one another on a regular basis. Group members enjoy occasional outings and provide support for each other if someone is unwell.

##### **Analysis and profile of service users and volunteers.**

The number of service users registered on our database has risen over the period of this year from 352 in 2009/10 to 386 in 2010/11. There were a number of casual visitors to the Kingswood drop-in, but unless a person is registered as a service user we do not include them on our database. Over this year, 44 service users left the organisation, compared to 41 last year. These include a number of deaths, which have risen over the last three years from 13 to 26 to 30.

There is of course a difference between the total number of people we help over the year and the numbers on the database when we calculate the number of actual service users at the end of the financial year.

## DULWICH HELPLINE

### TRUSTEES' REPORT

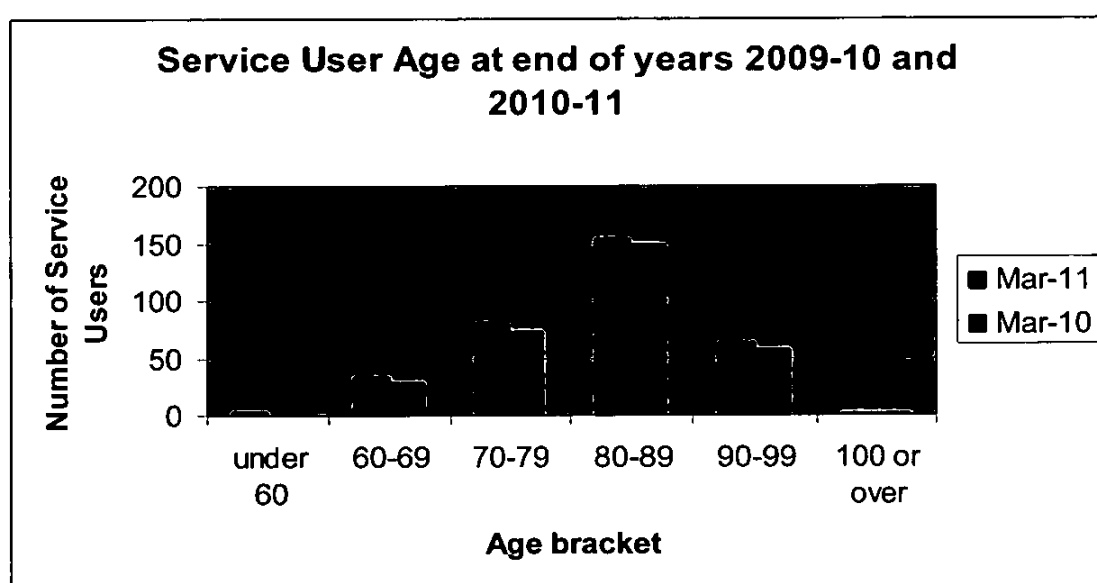
#### FOR THE YEAR ENDED 31 MARCH 2011

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##### Who are our service users?

The following statistics and graphs are based on the total number of service users over the year (386), regardless of when they joined or left us.

- **Gender:** As with previous years, we continue to have a predominantly female service user group, with approximately 80% female to 20% male
- **Age:** The graph below shows the average age of our service users is steadily rising. The average age at 31st March 2011 was 81.7 and there were 2 people aged 100 or over.



- **Disability:** Perhaps surprisingly, we have a fairly low, but steady number of service users who identify themselves as having a disability – some 20%. However, this question is only asked at the point of assessment, so if a person later becomes disabled, this may not be recorded. This number has remained constant for the last 3 years

##### How do we help them?

Our volunteers and services enable people to stay in their own homes, in conjunction with statutory services. (See case studies in Appendix 4) This section explains in more detail the services that we provide (See page 6)

##### 1. One-to one befriending

Volunteers visit people in their own homes, usually for an hour or so once a week, for a cup of tea and a chat, to undertake a task, or to share an activity or interest with their service user. Examples include reading correspondence or a newspaper to someone who has visual problems, playing a game of scrabble or chess, listening to music together or accompanying someone on a short walk

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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#### **2. Activity Groups**

We run a selection of groups in the local area. These are listed in Appendix 1

#### **3. Hospital Visiting**

We have a regular volunteer who visits our service users in King's College Hospital

#### **4. Intergenerational work**

We have worked hard to involve our local state and private schools in volunteer activity. The story of a successful initiative involving school volunteers is at Appendix 2.

#### **5. Practical Help**

The things we can usually help with are set out below. If we are not able to help, we can usually find a helper through our partnership organisations and contacts

- Gardening: volunteers can help with minor jobs such as mowing the lawn, hedge trimming, weeding and clearing leaves,
- Escorted Shopping: a volunteer can accompany a service user by public transport or drive in their own car to the local shops or supermarket,
- Odd Jobs: a volunteer can help with minor jobs such as changing curtains, a light bulb fuse or plug;
- Transport: we can provide help with transport to appointments such as chiropodist, hairdresser or dentist

#### **In the year 2010-11, we facilitated: -**

- 22 separate activity group meetings, held on 404 separate occasions with a total of 3118 attendances, in contrast to 2009/10 when 409 meetings took place generating attendances of 3442. The average number of people attending was slightly lower, at 7.7 compared to 8.4 in 2009/10. We believe this was attributable to two periods of exceptionally cold, snowy weather.
- Volunteers completed at least 2460 separate practical tasks for service users, transport representing the largest contribution.
- We coordinated 77 befriending relationships.
- 277 volunteers supported Dulwich Helpline over the course of the year. We also received support from approximately 55 young people from 5 local schools who befriended older people, taught in the intergenerational computer courses and participated in other intergenerational activity. (Appendix 2 for a full report of intergenerational work)
- Four editions of the Dulwich Helpline Herald newsletter were sent to our service users, volunteers and other professionals. These quarterly newsletters contain useful information, and fundraising initiatives, to help keep everyone up to date.

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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##### **A Statistical Breakdown of our work in 2010-11: -**

Number of tasks for service users completed by volunteers: <sup>2</sup>	2460
Number of groups offered over the year <sup>3</sup>	22
Number of meetings of groups in total. <sup>4</sup>	404
Number of individual attendances at groups in total <sup>5</sup>	3118
Average number of group attendance per group, per meeting	7.7

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<sup>2</sup> Although work has progressed on this, we are still aware that this number does not represent the full extent of tasks being undertaken. Underreporting is likely to be because the boundaries between volunteers and service users blur into friendship and reporting becomes forgotten.

<sup>3</sup> In September 2010 we started a new group at Kingsdale School and computer groups in early 2011 at Kingsdale and Charter schools. The 'Edward Alleyn' Group went independent of Dulwich Helpline in this year.

<sup>4</sup> The number of meetings reduced due to adverse weather and the changes outlined above. The schools groups meet Sept-March and only in term time, making the annual number for these lower than with other groups.

<sup>5</sup> The number of attendances could include people attending more than one group. We expect that this number dropped this year due to the adverse weather, which meant some groups were cancelled and others less well attended.

## DULWICH HELPLINE

### TRUSTEES' REPORT

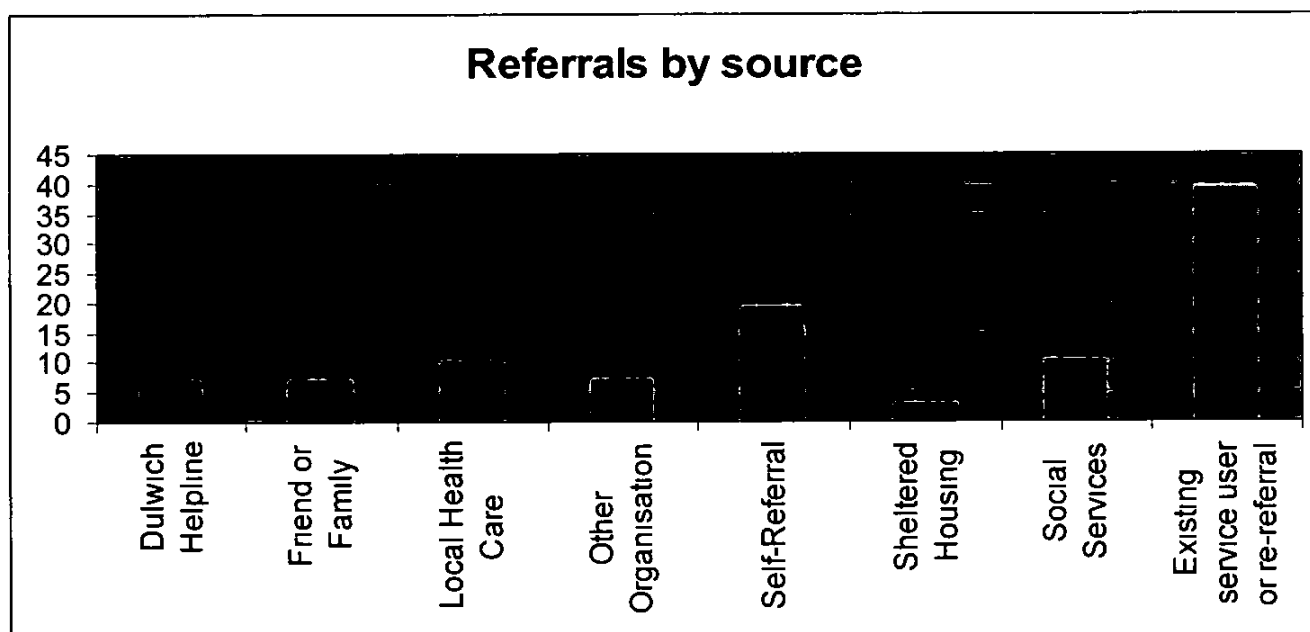
FOR THE YEAR ENDED 31 MARCH 2011

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#### Where do our referrals come from?

Our referrals come in various ways: GP surgeries, health workers, social services, family, friends, and neighbours, or simply people calling us themselves

The graph below shows our referrals over the year, by referral source



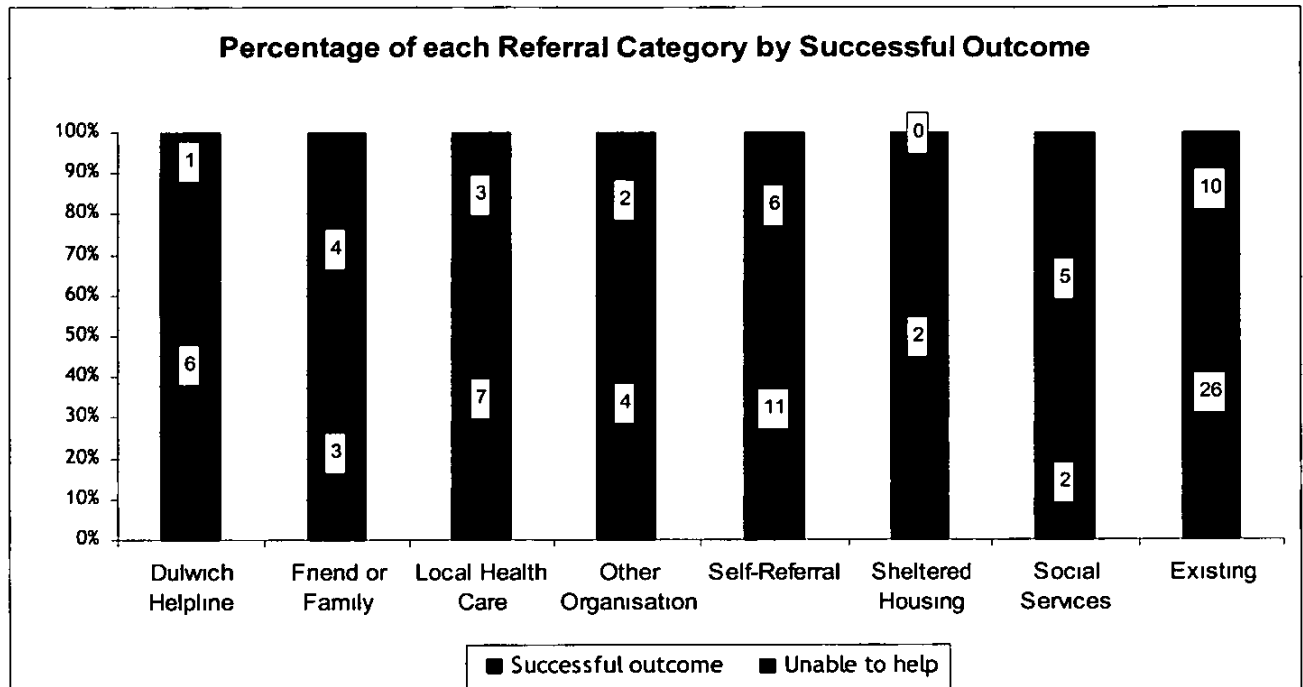
#### Explanations -

- The 'Dulwich Helpline' category shows referrals from people within the organisation, such as volunteers referring friends and neighbours as potential service users.
- The 'existing' category is for current service users who have come back to ask for a new or change in service, for instance, if a volunteer befriender leaves us and the user would like a new person to visit them.

## DULWICH HELPLINE

### TRUSTEES' REPORT

FOR THE YEAR ENDED 31 MARCH 2011



#### Who are our volunteers?

The following statistics and graphs are based on the number of volunteers over the year, (277 people) regardless of when they joined or left us

- **Gender** As with previous years, we continue to have a predominantly female volunteer group, with 86% of our volunteers being female
- **Age** -
  - There are 25 people where date of birth is not recorded,
  - 26 people are over 70
  - A further 48 are aged 55-69,
  - This leaves 122 who are under 55 – the school volunteers in our intergenerational projects would be in addition to this.

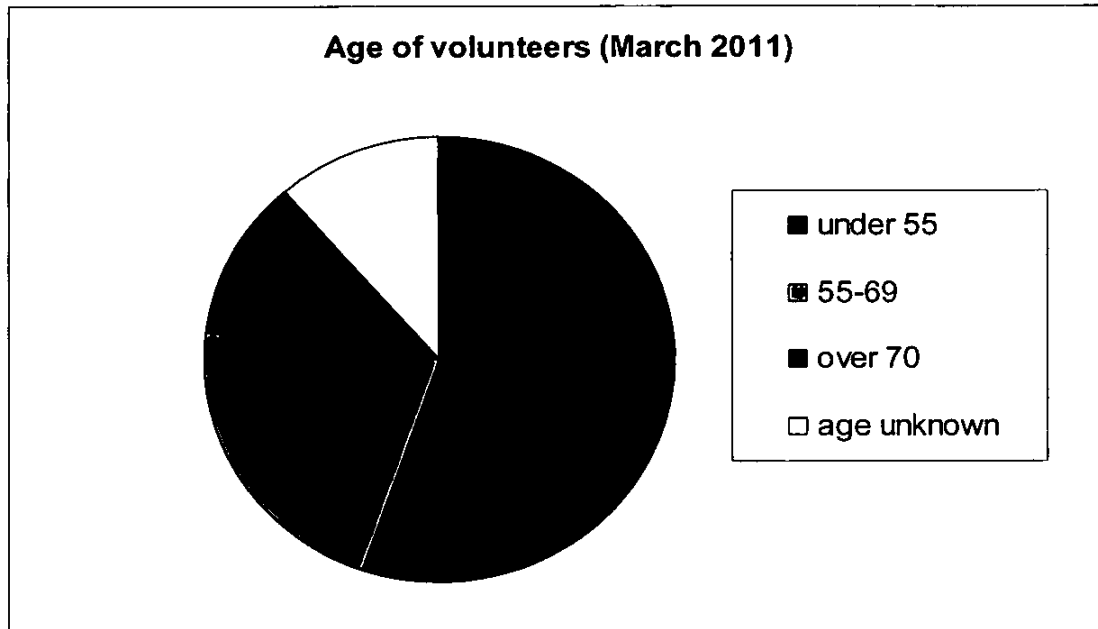


## DULWICH HELPLINE

### TRUSTEES' REPORT

FOR THE YEAR ENDED 31 MARCH 2011

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- **Ethnicity** we record the ethnicity categories of all our service users and volunteers using the 16+1 Self Defined Ethnicity (SDE) codes. However, this demographic area is under-recorded at present. Achieving 100% data is a target for us, and is something we hope to address in the coming year.

#### **Performance as rated by our volunteers**

A focus group was held in July 2009 facilitated and recorded by two people external to the organisation. The key points from this were that

- Generally volunteers were satisfied with the support they received, particularly when there were problems with service users
- There was a quick response to phone calls
- They felt well informed through the Dulwich Helpline Herald newsletter, emails and post

They also had ideas about other things we could do. These include

- Using Facebook as a communication tool – our Facebook page has been online for a year and our number of 'friends' continues to grow
- Wider advertising for the recruitment of more volunteers – more events and fairs have been attended this year, and a greater diversity of fairs has been achieved
- Increase the distribution network for our leaflets – this is ongoing as part of a new distribution drive in 2011-12.

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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#### **REVIEW OF FUNDRAISING ACTIVITIES**

We had a successful year in generating income. Total income for the year was £237,802. This was more than we had anticipated and reflects successful applications for grants made to new and existing funders. We had donations from 17 trusts, including 7 first-time donors. The income also reflects the success of local fundraising and we are grateful to individual donors and local organisations who support Dulwich Helpline so generously. Income from fundraising and donations from the local community was nearly £40,000.

As in previous years, the largest proportion of Helpline funding came Southwark Social Care and Health, just under £94,000, which represents 40% of total income. However it is very unlikely that we will receive this level of funding from the statutory sector again. Any income from Southwark in the future may be predicated on Dulwich Helpline providing a service against a very defined specification.

For 2011-12, we already have expected income of just under £139,000 from charitable trusts. In addition we aim to raise some £50,000 from the local community and our own fundraising activities.

We have also taken steps to increase our investment income by moving a substantial proportion of our reserves to accounts offering more favourable interest rates.

#### **FINANCIAL REVIEW**

Our total expenditure for the year was some £215,000 and, with a total income of nearly £238,000, we have been able to increase our reserves by almost £24,000 (to £166,000). We feel that this is prudent as the outlook beyond 2011-12 is uncertain. Dulwich Helpline has always depended on substantial funding from Southwark Social Care and Health, who are carrying out a review of 'discretionary services' and, with major cuts expected in all local authority budgets, they have been unable to say to what extent they will continue to support Dulwich Helpline. In addition, the future of the Community Hospital site in East Dulwich Grove is unclear. At present, Dulwich Helpline rents premises within the hospital at a favourable annual rent. If Dulwich Helpline had to move from these premises it seems unlikely that suitable alternative work space could be found at a comparable rent. For both of these reasons, the Trustees decided in 2010 that our reserves should be set at a level that would allow Dulwich Helpline to continue to operate at its current level of activity while options for operating at a lower level of activity were explored.

The largest share of Helpline expenditure (some 75%) is payment of the staff who co-ordinate all Helpline activities. Our staff are paid according to local authority scales for staff carrying out comparable duties. In discussion with staff in 2010 there were some small reductions in the number of paid hours worked. We have also undertaken some scenario planning with staff and Trustees to try to determine the options available if funding were to fall substantially.

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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We would like to thank the following for the grants that they have made to us during the year -

- Albert Hunt Trust
- Capital Group
- Dulwich Almshouses
- Elizabeth and Prince Zaiger
- Garfield Weston
- Goldsmiths' Company
- Henry Smith Chanty
- Inman Charity Trustees
- Leathersellers' Company
- Lloyds TSB Foundation
- Mercers' Charitable Foundation
- Merchant Taylors' Company
- Peter Minet Trust
- Robert McAlpine Foundation
- Sobell Foundation
- Southwark Council
- Wates Foundation

#### **RESERVES POLICY**

Dulwich Helpline needs to carry a sufficient reserve to maintain a reasonable level of service to service users (which requires the continued employment of members of staff) in the event of a gap in the provision of income or an unforeseen rise in expenditure (It often takes time for trusts to respond to requests, and payments of grants do not necessarily follow Dulwich Helpline's financial year. An example of an increase in expenditure would be the need to find new, more expensive accommodation )

We also need sufficient funds to meet our legal obligations to staff in the event of termination of an employment contract, to meet any ex-gratia payment approved by the Trustees, and to fund temporary staff in the absence of permanent staff (e g. as a result of maternity or long-term sick leave).

Our previous policy was that reserves should be at a level of between three and six months' recurrent expenditure. Responding to the increased risk of having to find new, more expensive, accommodation, and the likelihood of severely reduced funding from Southwark, in 2010 the Trustees felt that reserves should be increased to a level that would permit three to six months normal operations while alternatives were explored. In addition reserves should then be sufficient to fund an orderly wind up of Dulwich Helpline. A rough estimate of the cost of redundancy payments to staff plus legal costs of winding up Dulwich Helpline is £60,000. At current levels of expenditure the reserves therefore need to be maintained between £114,000 and £167,000. At the year end the charity held free reserves (unrestricted funds) of £166,000

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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### **PLANS FOR THE FUTURE**

Dulwich Helpline's principal aims and objectives remain the same for 2011-2012 as described above. We will work to achieve

#### **For service users**

- Increased independence and ability to remain in their own homes;
- Reduced anxiety and increased self-confidence,
- Involvement in planning and delivering the service,
- Feeling supported by and connected to the wider community,
- Encouragement to acquire new skills

#### **For volunteers**

- Positive contribution to and identification with the local community,
- A satisfying and enjoyable experience,
- Involvement in planning and delivering the service,
- Encouragement to acquire new skills.

#### **For the community**

- Increased community cohesion,
- Provision of a range of services to older people in the community by the community

To achieve these aims we are continuing to recruit, induct and train local volunteers who will provide emotional and practical support to isolated older people in the area:

- we plan to run groups covering a range of activities that promote mental and physical health, and to look into new areas of activity,
- we will respond to user requests for both emotional and practical support and match suitable volunteers with service users to provide this,
- we will encourage more service users to become involved as volunteers themselves and encourage groups to make their own independent decisions about activities,
- we will promote Dulwich Helpline widely across the local community to involve the maximum number of potential service users and volunteers. we will also provide information about our activities and opportunities to service users, volunteers and supporters through regular editions of the Dulwich Helpline Herald newsletter,
- as agreed with current funders we will monitor and report on our activities,
- we will consult service users and volunteers and involve them in future planning through forums, surveys and group evaluations;

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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- we will continue to apply for grants and to raise money from the local community to support our activities

In addition to this we have been exploring the possibility of closer working with other local charities and organisations. We have made some new connections and learnt a lot about how other organisations operate and the funding challenges they face. The partnership initiative has moved forward with Southwark Churches Care (SCC). This is a charity with similar objectives to our own that operates in the centre and north of the borough. Our Trustees have met the SCC Trustees on a number of occasions and the boards have agreed that there are considerable advantages in working closely together, co-locating the two services at Dulwich Hospital in order to secure the provision of viable and sustainable befriending and social opportunities in Southwark.

Officers and Trustees will develop clear plans to integrate some aspects of our work and will monitor the progress we make and will assess the benefits.

The expected benefits are

- Greater success with funding applications,
- Efficiencies in operational aspects of the service,
- A bigger critical mass of service users and volunteers and better access to a greater range of services,
- Shared learning by both organisations, leading to continuous improvement

## **RISK MANAGEMENT AND GOVERNANCE**

### **Risk management**

The Trustees have assessed the major risks to which the charity is exposed, in particular those related to its operations and finances, and are satisfied that systems and procedures are in place to mitigate exposure to the major risks.

Members of the Board of Trustees and the Director carried out the annual risk assessment in March 2010 for the year 2010-11. (Each risk identified is graded according to likelihood and severity where 1 = low and 5 = high. By multiplying these figures together the assessment of risk is placed on a scale from 1 (low risk) to 25 (high). The Board of Trustees judged the following to be high risks (with a score of 12 or over) and considered action to minimise them.

## **FINANCIAL**

### **Loss of key funders:**

- We must accept that we will continually 'lose' key funders. All the major charitable trusts have time limits on how long funding can carry on for. To mitigate this we continue to research new funders and to apply to new sources. We also keep in contact

## **DULWICH HELPLINE**

### **TRUSTEES' REPORT**

#### **FOR THE YEAR ENDED 31 MARCH 2011**

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with charitable trusts that have funded us in the past and apply for further funding at the earliest permitted date

- Other ways of mitigating the effect of losing key funders is to raise more money from the local community. We will continue to build on the success we have had in the past two years. We aim to try to repeat the success of this year where we raised nearly £40,000 in donations. The Fundraising Action Group which has a staff member, a Trustee and a number of volunteers now meets on a quarterly basis to plan and be involved with community fundraising events for the organisation
- The grant money from Southwark is where Dulwich Helpline remains most vulnerable as this would be extremely hard to replace were it to be cut off. It is unlikely that Southwark Social Care and Health will continue to fund us to the tune of some £94,000 as their own position is considerably worse than in previous years

#### **Inability to find new funders**

One way to mitigate this is to involve more people within the organisation in fundraising so that skills across the organisation are shared. During 2010-11, three Trustees have been working with the Director in both researching major donors and making applications. The staff have also been involved in providing material for the applications. We will encourage other Trustees to contribute to this work. The fundraising strategy was reviewed by the Trustees and various actions are being taken forward.

#### **Change in Priority for Funders**

In recent years trusts have followed government policies to assist young people and the needs of older people have had a lower priority. We now hope, however, that with increasing emphasis on the 'Big Society' funders will give higher priority to organisations such as Dulwich Helpline that harness local resources for the benefit of the local community.

### **TRUSTEES' LIABILITY**

The members (including the Trustees) of the company guarantee to contribute an amount not exceeding £10 each to the assets of the charity in the event of winding up.

### **TRUSTEES' RESPONSIBILITIES**

The Trustees are responsible for preparing the annual report and the financial statements in accordance with applicable law and regulations. Company and charity law require the Trustees to prepare financial statements for each financial year. Under that law the Trustees have prepared the financial statements in accordance with United Kingdom Generally Accepted Accounting Practice (United Kingdom Accounting Standards and applicable law). The financial statements are required by law to give a true and fair view of the state of affairs of the charitable company and of its incoming resources and application of resources, including its income and

## **DULWICH HELPLINE**

## **TRUSTEES' REPORT**

### **FOR THE YEAR ENDED 31 MARCH 2011**

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expenditure, for that period. In preparing these financial statements, the Trustees are required to

- select suitable accounting policies and then apply them consistently;
- make judgements and estimates that are reasonable and prudent, and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business

The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the company and hence for taking reasonable steps for the detection and prevention of fraud and other irregularities

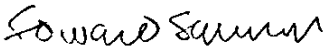
So far as each of the Trustees is aware at the time the report is approved.

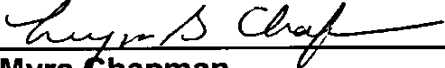
- there is no relevant audit information of which the company's auditors are unaware, and
- the Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information

## **INDEPENDENT EXAMINERS**

Knox Cropper, Chartered Accountants, completed their first year as independent examiners and a proposal to renew their appointment will be put to the 2011 Annual General Meeting

This report was approved by the Trustees on 20<sup>th</sup> September 2011 and signed on its behalf by:

  
**Edward Salmon**  
Chair

  
**Myra Chapman**  
Treasurer

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF  
DULWICH HELPLINE  
FOR THE YEAR ENDED 31 MARCH 2011**

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I report on the financial statements of Dulwich Helpline for the year ended 31 March 2011 which comprise the statement of financial activities (incorporating the income and expenditure account), the balance sheet and the related notes

**Respective responsibilities of trustees and examiner**

The charity's trustees, who are also the directors of the charitable company, are responsible for the preparation of the financial statements. The trustees consider that an audit is not required for this year under section 43 (2) of the Charities Act 1993 (the Act) and that an independent examination is required. It is my responsibility to

- examine the accounts under section 43 of the Act
- follow the procedures specified in the General Directions given by the Charity Commission under section 43 (7) (b) of the Act,
- state whether particular matters have come to my attention

**Basis of Independent Examiner's Report**

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 accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently I do not express an audit opinion as to whether the accounts present a "true and fair" view and the report is limited to those matters set out in the statement below

**Independent examiner's Statement**

In connection with my examination, no matter has come to my attention

- 1) which gives me reasonable cause to believe that in any material respect the requirements
  - to keep accounting records in accordance with the companies Act 2006, and
  - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Companies Act 2006 and Statement of Recommended Practice Accounting and Reporting by Charitieshave not been met, or
- 2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached

Signed *Kevin Lally*  
Kevin Lally ACA  
Knox Cropper, Chartered Accountants  
8/9 Well Court, London, EC4M 9DN

Date *2<sup>nd</sup> September 2011*



# DULWICH HELPLINE

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING THE INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 MARCH 2011

	Notes	Un- Restricted £	Restricted £	Total 2011 £	Total 2010 £
<b>INCOMING RESOURCES</b>					
<b>Incoming Resources from</b>					
<b>Generated Funds</b>					
Voluntary Income	2	106,885	24,500	131,385	141,614
<b>Activities for generating funds:</b>					
Fundraising Income		12,107	-	12,107	11,495
Investment Income – Bank Interest		337	-	337	382
<b>Incoming resources from</b>					
<b>charitable activities – Supporting</b>					
Older People	3	93,973	-	93,973	93,973
<b>Other Income</b>		-	-	-	75
<b>Total Incoming Resources</b>		<u>213,302</u>	<u>24,500</u>	<u>237,802</u>	<u>247,539</u>
<b>RESOURCES EXPENDED</b>					
Costs of Generating Voluntary Income	4	21,552	-	21,552	21,202
Charitable Activities – Supporting Older People	7	156,067	23,542	179,609	173,333
Governance Costs	6	13,586	-	13,586	16,958
<b>Total Resources Expended</b>		<u>191,205</u>	<u>23,542</u>	<u>214,747</u>	<u>211,493</u>
<b>Net Income/(Expenditure) before transfers</b>		22,097	958	23,055	36,046
Transfers Between Funds	13	-	-	-	-
<b>Net Movement in Funds in the Year Income/(Expenditure)</b>		22,097	958	23,055	36,046
<b>Reconciliation of Funds</b>					
Total Funds at 1 <sup>st</sup> April 2010		144,315	-	144,315	108,269
<b>Total Funds at 31<sup>st</sup> March 2011</b>		<u>166,412</u>	<u>958</u>	<u>167,370</u>	<u>£144,315</u>

The Statement of Financial Activities includes all gains and losses recognised in the year  
The notes on pages 25-31 form part of these financial statements

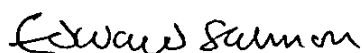
**DULWICH HELPLINE****BALANCE SHEET****FOR THE YEAR ENDED 31 MARCH 2011**

	Notes	£	2011	£	£	2010	£
<b>FIXED ASSETS</b>	10			-			-
<b>CURRENT ASSETS</b>							
Debtors	11	7,075			7,448		
Cash at bank and in hand		<u>174,823</u>			<u>158,559</u>		
		181,898			166,007		
<b>CREDITORS:</b>	12						
Amount falling due within one year		<u>(14,528)</u>			<u>(21,692)</u>		
<b>NET CURRENT ASSETS</b>				167,370			144,315
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>				<u>£167,370</u>			<u>£144,315</u>
<b>CHARITY FUNDS</b>							
Restricted Funds	13			958			-
Unrestricted Funds	13			166,412			144,315
				<u>£167,370</u>			<u>£144,315</u>

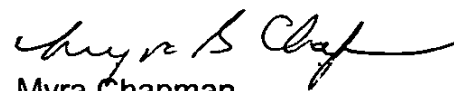
The Company is exempt from the requirements relating to preparing audited accounts in accordance with Section 477 of the Companies Act 2006. The members have not required the Company to obtain an audit of its accounts for the year in question in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of accounts. These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

The financial statements were approved by the Trustees on the 02/03 | 2011 and signed on their behalf by.



Edward Salmon  
Chair

  
Myra Chapman  
Trustee

The notes on pages 25-31 form part of these financial statements

Company Registration Number 05189161

## 1 ACCOUNTING POLICIES

### **Basis of Preparation**

The financial statements have been prepared under the historical cost convention and in accordance with the special provisions of Part VII of the Companies Act 2006 applicable to small companies and in accordance with the Financial Reporting Standard for Smaller Entities (effective January 2007). The financial statements have been prepared in accordance with the Statement of Recommended Practice (SORP), "Accounting and Reporting by Charities" published in March 2005, applicable accounting standards and the Companies Act 2006.

### **Company Status**

The company is a company limited by guarantee. In the event of the company being wound up, the liability in respect of the guarantee is limited to £10 per member of the company.

### **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 company and which have not been designated for other purposes.

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

Investment income, gains and losses are allocated to the appropriate fund.

### **Incoming Resources**

All incoming resources are included in the Statement of Financial Activities when the company is legally entitled to the income and the amount can be quantified with reasonable accuracy – except when donors specify that donations and grants given to the charity must be used in future accounting periods, the income is deferred until those periods.

### **Resources Expended**

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. Overheads and other salaries are allocated between the expense headings on the basis of time spent.

Fundraising costs are those incurred in seeking voluntary contributions and do not include the costs of disseminating information in support of the charitable activities.

Support costs are those costs incurred directly in support of expenditure on the objects of the charity and are allocated on the basis of staff cost.

**1 ACCOUNTING POLICIES (Continued)**

**Resources Expended (Continued)**

Governance costs are those incurred in connection with enabling the charity to comply with external regulation, constitutional and statutory requirements and in providing support to the board of trustees in the discharge of their statutory duties

**Tangible Fixed Assets and Depreciation**

All assets costing more than £1,000 are capitalised.

Tangible fixed assets are stated at cost less depreciation. Depreciation is provided at rates calculated to write off the cost of fixed assets, less their estimated residual value over their expected useful lives on the following bases

Furniture and Fixtures	33.33%	straight line
Office Equipment	33.33%	straight line

**Pensions**

The Charity contributed up to 10% of gross salaries into individual employee's personal pension schemes as approved by the board of trustees. Pension charge represents the amounts payable by the company to the various schemes in respect of the year

# DULWICH HELPLINE

## NOTES TO THE FINANCIAL STATEMENTS (Continued)

FOR THE YEAR ENDED 31 MARCH 2011

### 2 VOLUNTARY INCOME

	Unrestricted	Restricted	2011 Total	2010 Total
	£	£	£	£
<b>Grant Income</b>				
The Dulwich Almshouses Charity	-	2,000	2,000	2,000
Wates Foundation	-	-	-	10,000
The John Horseman Trust	2,000	-	2,000	-
The Henry Smith Charity	-	20,000	20,000	20,000
The Rayne Foundation	12,500	-	12,500	-
Imman Charity	-	-	-	3,000
Lloyds TSB Foundation	5,000	-	5,000	5,000
Merchant Taylors' Company	10,000	-	10,000	15,000
The Leathersellers' Company Charitable Fund	-	-	-	2,000
The Robert McAlpine Foundation	10,000	-	10,000	15,000
Garfield Weston Foundation	-	-	-	5,000
Capital International	13,500	-	13,500	2,000
The Peter Minet Trust	-	-	-	2,000
The Sobell Foundation	10,000	-	10,000	10,000
Mercers Charitable Foundation	-	-	-	5,000
Albert Hunt Trust	-	-	-	1,000
The Goldsmiths Company	-	-	-	3,000
Metropolitan Police	-	2,500	2,500	-
The Elizabeth and Prince Zaiger Trust	5,000	-	5,000	5,000
<b>Other Voluntary Income</b>				
Dulwich Luncheon Club	2,650	-	2,650	2,470
Church Collections	3,503	-	3,503	1,395
Gift Aid	2,954	-	2,954	6,987
Friends	10,299	-	10,299	7,635
Concerts	2,577	-	2,577	2,287
Other Voluntary Income	9,547	-	9,547	8,750
Christmas Appeals	3,403	-	3,403	2,172
In Memoriam	2,567	-	2,567	1,526
Funraisers	1,385	-	1,385	3,392
	<b>£106,885</b>	<b>£24,500</b>	<b>£131,385</b>	<b>£141,614</b>

### 3 Charitable Activities – SUPPORTING OLDER PEOPLE

	Restricted Funds £	Unrestricted Funds £	Total Funds 2011 £	Total Funds 2010 £
Southwark Health and Social Care	-	93,973	93,973	93,973
	<b>£-</b>	<b>£93,973</b>	<b>£93,973</b>	<b>£93,973</b>

# DULWICH HELPLINE

## NOTES TO THE FINANCIAL STATEMENTS (Continued)

FOR THE YEAR ENDED 31 MARCH 2011

### 4 RESOURCES EXPENDED

	Direct Staff Costs £	Other Direct Costs £	Support Costs £	2011 £	2010 £
<b>Charitable Expenditure</b>					
Supporting Older People	111,385	14,921	53,303	179,609	173,333
<b>Other Expenditure</b>					
Cost of Generating Voluntary Income	12,955	2,395	6,202	21,552	21,202
Governance Costs	4,965	6,245	2,376	13,586	16,958
<b>Total</b>	<b>£129,305</b>	<b>£23,561</b>	<b>£61,881</b>	<b>£214,747</b>	<b>£211,493</b>

### 5 SUPPORT COSTS:

	Supporting Older People £	Cost of Generating Voluntary Income £	Governance Costs £	2011 £	2010 £
Repairs, Maintenance & IT	2,868	334	128	3,330	2,748
Telephone	2,061	240	92	2,393	2,182
Bookkeeping	4,430	515	197	5,142	5,389
Rent	6,608	769	295	7,672	6,304
Insurance	1,373	160	61	1,594	1,547
Training	1,364	159	61	1,584	801
Printing, Postage & Stationery	7,071	823	315	8,209	6,369
Staff Costs	27,528	3,202	1,227	31,957	34,782
<b>Total</b>	<b>£53,303</b>	<b>£6,202</b>	<b>£2,376</b>	<b>£61,881</b>	<b>£60,122</b>

### 6 GOVERNANCE

	2011 £	2010 £
Audit and Accountancy Fees		
Trustees' Costs	2,304	3,302
Support Costs	3,941	3,259
Staff Costs	2,376	5,197
	4,965	5,200
	<b>£13,586</b>	<b>£16,958</b>

**DULWICH HELPLINE****NOTES TO THE FINANCIAL STATEMENTS (Continued)****FOR THE YEAR ENDED 31 MARCH 2011****7 ANALYSIS OF RESOURCES EXPENDED BY ACTIVITIES**

	<b>Activities Undertaken Directly £</b>	<b>Support Costs £</b>	<b>2011 Total £</b>	<b>2010 Total £</b>
Supporting Older People	<u>£126,306</u>	<u>£53,303</u>	<u>£179,609</u>	<u>£173,333</u>

**8 NET INCOME (EXPENDITURE)**

	<b>2011 £</b>	<b>2010 £</b>
This is stated after charging		
Depreciation of tangible fixed assets	-	-
- Independent examination	2,304	2,800
- Accountancy fees	-	502
Pension Costs	<u>5,179</u>	<u>5,419</u>

During the year, no trustees received any remuneration (2010 - £ Nil)

During the year, no trustees received any benefits in kind (2010 £Nil)

During the year, no trustees received any reimbursement of expenses (2010 £Nil)

**9 STAFF COSTS**

	<b>2011</b>	<b>2010</b>
Staff costs were as follows	£	£
Wages and Salaries	145,046	146,301
Social Security Costs	11,037	11,052
Pension Costs	<u>5,179</u>	<u>5,419</u>
	<u>161,262</u>	<u>£162,772</u>

The average number of full –time equivalent employees during the year was

<b>NO:</b>	<b>NO:</b>
4	4
1	1
<u>5</u>	<u>5</u>

No employee received remuneration amounting to more than £60,000 in the year (2010 none)

**DULWICH HELPLINE****NOTES TO THE FINANCIAL STATEMENTS (Continued)****FOR THE YEAR ENDED 31 MARCH 2011****10 TANGIBLE FIXED ASSETS**

	<b>Office Equipment £</b>
<b>Cost</b>	
At 1 April 2010	15,698
Additions	-
Disposals	-
At 31 March 2011	<u>15,698</u>
<b>Depreciation</b>	
At 1 April 2010	15,698
Charge for the year	-
Eliminated on Disposals	-
At 31 March 2011	<u>15,698</u>
<b>Net Book Value</b>	
At 31 March 2011	<u>£-</u>
At 31 March 2010	<u>£-</u>

**11 DEBTORS**

	<b>2011 £</b>	<b>2010 £</b>
Other Debtors	4,626	6,343
Prepayments and Accrued Income	2,449	1,105
	<u>7,075</u>	<u>£7,448</u>

**12 CREDITORS: amounts falling due within one year**

	<b>2011 £</b>	<b>2010 £</b>
Other Creditors	-	-
Accruals and Deferred Income	14,528	21,692
	<u>£14,528</u>	<u>£21,692</u>



# DULWICH HELPLINE

## NOTES TO THE FINANCIAL STATEMENTS (Continued)

FOR THE YEAR ENDED 31 MARCH 2011

### 13 STATEMENT OF FUNDS

	Brought Forward £	Incoming Resources £	Resources Expended £	Carried Forward £
<b>Unrestricted Funds</b>				
General Funds	144,315	213,302	(191,205)	166,412
<b>Restricted Funds</b>				
The Dulwich Almshouses Charities	-	2,000	(2,000)	-
Metropolitan Police	-	2,500	(1,542)	958
The Henry Smith Charity	-	20,000	(20,000)	-
Subtotal	-	24,500	(23,542)	958
Total of Funds	£144,315	£237,802	£(214,747)	£167,370

### SUMMARY OF FUNDS

General Funds	144,315	213,302	(191,205)	166,412
Restricted Funds	-	24,500	(23,542)	958
	£144,315	£237,802	£(214,747)	£167,370

### 14 ANALYSIS OF NET ASSETS Between Funds

	Restricted Funds £	Unrestricted Funds £	2011 £	2010 £
Tangible Fixed Assets	-	-	-	-
Current Assets	958	180,940	181,898	166,007
Creditors due within one year	-	(14,528)	(14,528)	(21,692)
	£958	£166,412	167,370	£144,315

### 15 PENSION COMMITMENTS

The Charity contributed up to 10% of gross salaries into individual employee's personal pension schemes as approved by the board of Trustees. The pension cost charge represents contributions payable by the charity to the schemes and amounted to £5,179 (2010 £5,419). At the end of the year there were no amounts owing.

#### Pensions Trust

Dulwich Helpline participated in the Pensions trust's Growth Plan (the Plan). The Plan was funded and was not contacted out of the state scheme. The Growth Plan was a multi-employer pension plan. The charity left the Pension Scheme during 2009, resulting in an employer debt on withdrawal of £3,638.

## **Appendix 1 – List of Groups**

### **A- Z of Groups offered in 2010-11**

#### **1. Abbeyfield Reminiscence**

This weekly reminiscence group is held at a sheltered housing scheme in Herne Hill. Members follow an agreed reminiscence timetable each term and take it in turns to tell their stories. It is a friendly group who are always looking for people with new stories or for people from different backgrounds.

#### **2. Art Appreciation**

Talks and slide shows are given by a tutor from Dulwich Picture Gallery at a sheltered housing block in Herne Hill. Subjects are discussed and debated in the group. Gallery visits are also arranged to view exhibitions being shown during the year at Dulwich Picture Gallery.

#### **3. Book Club**

This meets on a monthly basis in a sheltered housing block in East Dulwich. The volunteer who runs the group also works for one of Southwark's Libraries and is able to access large print, talking books or specific books that members may request. Members take home as many books as they want to read and are asked to make comments about the books they have read. These are then discussed at the next meeting.

#### **4. Bridge Group**

The group gets together on a fortnightly basis and meets in the dining/sitting room of a small supported housing unit in East Dulwich. The group is run by two volunteers who are both skilled bridge players, their role being to assist members who are less able. Tea and coffee is served between games.

#### **5. Computer Groups x3**

We run computer groups within 3 local senior schools during term-time. Each group matches a school sixth form pupil with a service user for one-to-one learning about computers. Service users can follow a designed course, or work on whatever aspect appeals to them. Popular themes are emails and the internet, digital photography, or a basic introduction to computers for the first time. See Appendix 2 for more about our intergenerational work with schools.

#### **6. East Dulwich Grove Estate Group (Known as Life on the E D G E!)**

This group meets weekly at the Sea Cadets Hall in East Dulwich. It is a tea and chat group with regular background music played by one of the members on his keyboard. On alternate weeks Dulwich Helpline provide a programme of activity which includes newspaper discussion, quizzes, reminiscence sessions, games, craft and occasional guest speakers.

#### **7. Edward Alleyn Befriending Group**

This group meets monthly at Edward Alleyn House in Dulwich Village. Although the majority of the members live at Edward Alleyn House, the group is open to people living outside. This is a 'meet and chat' group where refreshments with cakes or fruit are served. There is a raffle and sometimes a quiz.

#### **8. Gentle Exercise Group**

This lively group meets every week in a sheltered housing block. They alternate weeks, between a general coffee morning and an exercise class - for an hour of chair-based exercise with a paid tutor, followed by tea and biscuits. It is a very popular and sociable group which is very well attended.

### **9. Kingswood Estate Befriending Group**

This group meets once a month at a community centre. Many of the members have poor mobility and are unable to get out to meet up, so friends and neighbours are brought together to have tea and a chat and reminisce about past times. Every birthday is also celebrated with a birthday cake and a glass of bubbly.

### **10. Kingswood Estate Drop-in**

This very popular drop-in group happens twice a month at a community centre on the estate. The drop-in offers a social occasion for the older people of the estate and a great opportunity to sit and chat, or make new friends. Each drop-in has a raffle and a quiz, as well as refreshments provided. There are often special events, such as speakers or performers for the group and these are publicised around the estate.

### **11. Kingswood Estate Reminiscence Group**

This lively group meets weekly at a community centre on the estate and is led by two volunteers who run the group on alternate weeks. Group members decide on topics for each term and share memories through photos, magazines, books or other items of interest. They also organise trips out, lunches during the year and other refreshments.

### **12. Kingswood Estate Shopping**

This is a monthly trip from Kingswood Estate to a large supermarket in Sydenham. Most of the service users travel by minibus which we provide. Help is available for those who need a hand while others shop independently. After everyone has done their shopping they meet up in the café for a cup of tea and a bite to eat.

### **13. Kingsdale School Oral History Project 2010-11**

We ran an oral history/reminiscence project with some of our service users and sixth-formers at Kingsdale Foundation School, something we have not done before. We met weekly, discussing a range of topics about our lives and finding a surprising amount of common ground. See Appendix 2 for more about our intergenerational work with schools.

### **14. Men's Group**

This group meets monthly in a local pub in Camberwell. Group members are offered a first drink (alcoholic or non alcoholic) which Dulwich Helpline pays for, members then pay for any further drinks. Topics of conversation vary each meeting. However many members like to reminisce about times past, and some enjoy a game of dominoes or cards.

### **15. Music Group**

The music group meets fortnightly at the home of one of the group members in East Dulwich. Ideas for the sessions are put forward by the members and a varied programme is produced. Examples include music by classical composers, songs from the shows, various concertos and occasional piano recitals. The sessions always start with refreshments and general chat.

### **16. Olley's Fish 'n Chip Lunch Group**

This group meets once a fortnight on Tuesday lunchtime for a fish and chip lunch and conversation at *Olley's Fish Restaurant* in Herne Hill.

### **17. Paxton Green Surgery Drop-in**

This group meets fortnightly and was initially set-up by Paxton Green Surgery at Gipsy Hill. This group is lively, well attended and run by the members. The surgery provides a room and helps towards their refreshments.

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### **18. Poetry**

This busy group meets fortnightly in a sheltered housing unit in Herne Hill and focuses on a different topic each time. Members can bring published poetry with them to read out around the topic, are invited to write their own, or can sit and listen to the other contributors. Topics are wide ranging and the leader asks for suggestions from the group about what topics to cover

### **19. Singing Group**

This weekly group is proving very popular, members join in for singing a variety of songs. It is held at a sheltered housing block in East Dulwich. All levels of singing are accommodated, the paid teacher emphasises the fun and health benefits for everyone

### **20. Yoga**

This gentle exercise group meets fortnightly in East Dulwich to do yoga-inspired chair based exercise, with a paid instructor. The group meets for tea and biscuits just before each session, offering the opportunity of a chat and some social time.

## Appendix 2 – Intergenerational Work

### Working with local Schools

We now work with all the local secondary schools in our area running a variety of projects. After some new successes this academic year, we are now planning ahead for the new school year starting in September 2011. We are hoping to work with each school again.

We would like to thank the school's staff for helping with organisation, and the students and older people who all took part.

#### **James Allen's Girls School (JAGS) – Computer Group and Summer Party 2010**

As well as ongoing intergenerational befriending relationships with the girls at JAGS, September 2010 saw the return of the already successful computer group held at the school. Girls from the sixth form volunteered their time to help older people get to grips with new technology. Among the older learners, we were pleased to welcome new faces, as well as some returning from previous years, hoping to overcome new technological challenges and take their IT skills a step further.

JAGS also kindly hosted our summer party for older people in 2010 with entertainment by the students, including homemade cakes, music, and singing, which proved a fun and successful occasion.

#### **“All our yesterdays...and todays” – NEW inter-generational group at Kingsdale School**

This year saw the beginnings of our working relationship with Kingsdale School. We ran an oral history/remembrance project with some of our service users and sixth-formers at the school, something we have not done before. We met weekly, discussing a range of topics about our lives and finding a surprising amount of common ground. As a pilot project we felt it went very well and are hoping to offer similar projects in the future.

After the project, we were delighted that some of the students decided to join Dulwich Helpline as permanent volunteers, offering befriending to other older people, as they had enjoyed their experiences so much.

*I signed up [to the project] because of my interest in the social history of Britain, and I thought that I would be able to learn a lot about it from the elder generation; and I was by no means disappointed. I came to all of the discussions, and enjoyed the range of topics that we discussed. What initially surprised me was the fact that the viewpoints of the two represented generations on each of the topics were actually vastly similar.*

*The people who I met as part of the Dulwich Helpline were amazing; inclusive, always happy to talk about anything, and always with a story at hand, they made the whole experience rather wonderful, and meant that I did, truly, have a great time taking part in it. Some of the stories they told me and the others will hopefully stay with me for a very long time.*

*William, aged 17*

*We really enjoyed our time at Kingsdale. It was really interesting and the sixth-formers were so nice. It was a pleasure to meet them. They listened to all our memories of our schooldays and told us about their school work and their hopes for the future.*

*Many thanks for organising such a lovely school term for us. Once again saying that we enjoyed it.*

*Eva, service user*

I have helped someone who wouldn't have had help otherwise

I enjoyed talking to older people about life and stuff

I liked being able to help someone and to communicate with someone out of my age group

### **Charter School – NEW Computer group**

This year saw our first group held at Charter School. Working with the sixth form, we offered a new computer group for older people. In the same format as our previous computer groups, the students offered one-to-one support at the computers, around any subject for our older learners. We had complete beginners, through to people wanting to expand their knowledge of digital cameras, using websites and other technology.

I felt achievement in the feeling that someone has learned something useful through my input

Our connections and partnership working were closely involved, we were fortunate in attracting new service users as a result of the BBC 'First Click' campaign which we joined. In addition, we are also a member of the Age UK 'Digital Inclusion Network' and so all our older learners received a welcome pack based on resources available through this as well. The group proved a huge success and we hope to build on this again in the new school year and hopefully in following years.

I enjoyed discovering new things

I have learnt to email – to survive in the modern world!

I liked the informal atmosphere; I felt it was beneficial to both parties

### **Alleyn's School – Student volunteer befriending and Fundraising Concert**

We were pleased to be working with Alleyn's again in 2010, with their pupils offering one-to-one befriending for older people, as well as the school giving us wider support and hosting our fundraising concert in April 2010.

### **Dulwich College – visiting our Kingswood Reminiscence Group**

Our long-established reminiscence group on the Kingswood Estate really enjoyed getting to know their new visitors over the first two school terms of 2010/11. Boys from the College walked up to the community group over their school lunch break on a Wednesday afternoon, to join in the reminiscences and discussions with our older service users.

The boys each took along their own stories to add, many of them tales from different cultures and lifestyles abroad, but some much closer to home. They enjoyed listening to anecdotes from our service users about their lives and experiences over time.

The group bonded over tea, cake and fizzy drinks, considering generational commonalities and celebrating differences over time and cultures. Along with sharing jokes, they enjoyed discussing current affairs, events past, school and family life, personal recollections and their hopes for the future.

## **Appendix 3 – Fundraising Report**

Despite continuing challenging economic conditions, the Community Fundraising, organised by Caroline Dunmall, has gone from strength to strength and has brought in almost £40,000 this year. We are extremely grateful to everybody who has shown support for our work in a very real and tangible way. Our geographic area abounds with many different kinds of organisations, clubs and societies and many of these have given their support this year, which we greatly appreciate.

We hope to go on strengthening and building links and always welcome hearing from anyone with fundraising ideas.

The following journey through the year will give you an idea of some (and by no means all) of the support we have received:-

### **April**

- Bowjangles gave an outstanding performance at Alleyn's School. 200 people attended and the evening raised just over £2,000
- Dulwich Runner, Ajay Khandelwal, raised over £2,237 in the London Marathon.

### **June**

- The Rotary Club of Dulwich & Peckham invited us to take part in their annual Prize Draw which raised £428
- Our Dulwich Garden Safari, five private gardens in Dulwich, attracted 500 people and raised £3,676.

### **September**

- The James Allen Community Orchestra gave another concert for us and raised £428
- Alleyn Park Garden Centre held a promotion evening and raised £109

### **November**

- East Dulwich Women's Institute produced a fundraising calendar, *Calendar Girls*-style. This was in collaboration with local businesses who provided the venues and raised £1,633.
- New contact - Olley's Fish Experience, offered us a 3-course dinner for 35 diners. The evening raised £865

### **March**

- In collaboration with Rosebery's Auctioneers & Valuers, we ran an Antiques Discovery Day and Arts & Crafts Sale. Members of the public attended the event, with antiques to value, raising £1,967

This demonstrates the energy and commitment of our community fundraiser and the Fundraising Action Group. This source of funding has become increasingly important to us as other sources of funding have become less certain. These events also help maintain our profile in the local community.

### **The Friends' Scheme**

We have a large number of individuals who contribute to our Friends' Scheme (103) and we are aiming to recruit 1000 friends within the next five years. There are also a number of local organisations who fundraise on our behalf, give gifts 'in kind', provide vital publicity, run events or who nominate us as their charity of the year. This embeds us in our very generous local community. We are extremely grateful for this invaluable support.

## **Appendix 4 – Case Studies**

### **Case Study – Befriending**

Mrs B (name changed) was referred to Dulwich Helpline by Southwark Social Care Services. We also received a call from her son who explained that he had contacted Social Care as his mother had been falling and this in turn was affecting her confidence. As he and the family live some distance away, they were worried about her going out alone.

Mrs B had married at the end of the last war. Her husband had now died and any other remaining family lived abroad in her country of origin. The family were worried that many of her friends had also died and that her remaining friends were similarly isolated and unable to leave their homes. When Mrs B was assessed she was very concerned as to how she would cope now that her mobility had deteriorated. She had always tried to be independent. She also felt that her English was not good and sometimes found it hard to make herself understood.

At the assessment visit we discussed the possibility of having a befriender who would visit her weekly and accompany her to the shops. We also arranged to send a volunteer to help with her garden. Gardening help was put into place a day later.

The following week we found a volunteer who agreed to visit Mrs B and go shopping with her. The volunteer spoke the same language and a good rapport was established at their first meeting. Mrs B called the office some months later to say how pleased she was and that the volunteer was born and raised in a town close to where she had grown up. Fifteen months later the volunteer reports that Mrs B is now livelier, confident and enjoying her independence once again.

### **Case Study - Groups**

**East Dulwich Grove Estate Group (Known as Life on the EDGE!)**

This mixed group meet every week at The Sea Cadets Hall in Greendale, East Dulwich SE22.

They are a very close knit group, many of them have lived on the small estate for years. They provide support and friendship to each other during difficult times.

They catch up with each other over tea and biscuits and enjoy listening to one of the members playing his keyboard, sometimes as background music or to join in with a sing song.

On alternate weeks Dulwich Helpline provides an afternoon programme of activity based on the members' suggestions. Examples include games, quizzes, craft sessions, newspaper discussions and occasional guest speakers and outings.

The group have also had taster sessions with visiting tutors of Indian Head Massage and Pilates, both of which were enjoyed by the members, repeat sessions were requested and are being planned.



### **Case Study – Intergenerational Work**

Reg (name changed), a local 88-year-old, is receiving computer lessons from Mark (name changed), a sixth former at a local school

Reg came to us initially through the BBC 'First Click' Campaign, who told him we were offering free computer sessions to older people. He started coming along to our Kingsdale School computer group on a Wednesday afternoon, but then decided he would like more one-to-one support at home, on his own laptop

After careful matching, we introduced him to Mark, a new volunteer, with full CRB check and references, who now visits once a week, for an hour or so. Mark enjoys his volunteering and says

*"It's definitely worth it because I'm giving something back to the older generation. It's also teaching me good people skills "*

Reg is getting his first taste of sites like Facebook and Google, which are part of everyday life for Mark. Reg said he's looking forward to being able to do more once he's got the basics.

He said *"It's marvellous that the younger generation have all this now and it's a most important part of their life which I hope, eventually, to join "*

*"Age isn't really a barrier. You're a bit slower and you're not brought up with it like children are now. It takes a bit of time but it's well worth having a go."*

## **Appendix 5 – List of our Partner Agencies 2010 -11**

### ***With thanks to: -***

- Abacus Cards
- Abbeyfield Housing
- Age Concern Southwark and Lewisham
- Age Uk Digital Network
- Age Uk Lambeth
- Alleyn Park Garden Centre
- Alleyn's School
- The Alzheimers Society
- Ashton Edwards Trust
- BBC First Click Campaign
- Blackfriars Settlement
- The Charter School
- Community Action Southwark
- Concordia Chamber Choir
- The Co-operative – Lordship Lane Branch
- The Crystal Palace Foundation
- Dulwich College
- Dulwich Community Hospital
- Dulwich Library
- Dulwich Mead, Hanover
- Dulwich Picture Gallery
- Dulwich Players
- Dulwich Runners
- The Dulwich Society
- Dulwich Village Infants School
- East Dulwich Women's Institute
- Edward Alleyn Almshouses
- The Fox on the Hill Pub, Denmark Hill
- Friends of Kingswood House
- The 'Fun Raisers' group of Dulwich
- Greetings – Lordship Lane
- Health Matters – Lordship Lane
- The Herne Hill Society
- The Horniman Museum
- Independent Age
- James Allen Community Orchestra
- James Allen's Girl's School (JAGS)
- Kingsdale Foundation School
- Kingswood Estate Tenants and Residents Assn
- Kingswood House
- Lascot Transport
- Lew Evans House
- The Metropolitan Society for the Blind
- Moo Too – Lordship Lane
- Olley's Fish Experience – Norwood Road
- Paxton Green Surgery
- Paxton Green Timebank
- Peckham Settlement
- The Plough Pub, Lordship Lane
- Race Online 2012
- Rosebery's Auctioneers & Valuers
- The Rotary Club of Dulwich and Peckham
- Sainsbury's - Dog Kennel Hill Branch
- SE Magazines
- Silver Festival
- South London And Maudsley NHS Trust
- Southwark Borough Police
- Southwark Churches Care
- Southwark Council
- Southwark Pensioners Centre
- St James Cloisters - English Churches
- St Luke's Primary School, West Norwood
- Time and Talents
- Volunteer Centre Southwark

### ***With special thanks to: -***

- Our local Councillors for their ongoing help and support
- All those who have run events to fundraise for Dulwich Helpline.
- All our donors and people who support our work
- All of our volunteers, without whom we would not exist at all