

## **Draft Annual Report 1<sup>st</sup> April 2007 – 31<sup>st</sup> March 2008**

<b>The board of trustees</b>	Mr M Threlkeld	Chairman
	Mrs L Smith	Vice-Chairman
	Mr D Kent	Treasurer
	Dr J Cox	
	Mr D Bruin	
	Mr M Elderkin	
	Mr G Gash	
	Mr L Gleed	
	Mr F Shaw	
	Mr A Tyson	
	Mr D Ward	
	Mrs J Wetherall (retired)	
	Mrs C Johnson	
	Mr K Bridges	
	Mr W Smith	
	Mrs E Bell (retired)	

**Company secretary** Mr M Guy  
Mrs J Woodcock

**Registered office** Millhouse Village Hall  
Millhouse  
Wigton  
Cumbria  
CA7 8HR

**Independent examiner** Andrew Liddle for and on behalf of Saint & Co  
Saint and Co  
Chartered Accountants  
Poets Walk  
Penrith  
Cumbria  
CA11 7HJ

**Bankers** Lloyds TSB Bank plc  
6 Lowther Street  
Carlisle  
Cumbria  
CA3 8DB

The trustees, who are also Directors for the purposes of the Companies Act, have pleasure in presenting their report and the unaudited financial statements of the charity for the year ended 31 March 2008.

### **LEGAL STATUS**

The charity was incorporated on the 6 August 2002 and began its charitable activities on that date. The charity is governed by its memorandum and articles of association.

### **OBJECTIVES OF THE CHARITY**

The Northern Fells Rural Community Development Group promotes and undertakes (either alone or on behalf of or in association with other bodies, organisations and individuals) charitable activities of any kind for the benefit and welfare of the inhabitants, communities and organisations in the parishes of Ireby with Uldale, Boltons, Westward, Sebergham, Caldbeck, Castle Sowerby and Mungrisdale in the county of Cumbria and elsewhere.

## **ORGANISATION**

The management of the group is entrusted to the committee, which consists of the officers, namely Chairman, Vice-Chairman and Treasurer and up to twelve other members plus co-opted members. The committee meets no less than four times per year.

All officers and committee members are members of the group. Each of the Parish Councils of the seven parishes of Ireby with Uldale, Boltons, Westward, Sebergham, Caldbeck, Castle Sowerby and Mungrisdale nominate a committee member at the Annual General Meeting who serve for the following year. Other officers and committee members are elected annually at the Annual General Meeting.

The committee has powers to do all things necessary and desirable in pursuit of the objects of the group.

## **MEMBERSHIP**

There are currently 120 individual members of the Northern Fells Group and 60 family members. Membership costs £5 per annum or £15 for a family (reviewed annually) and is open to anyone living within the Northern Fells Area or wishing to support the aims of the Northern Fells Group.

## **SERVICES**

The group runs the following services:

- Core administration, research, development and fundraising;
- The Lend a Hand Group provides neighbourly support to people who are ill or less able, and their carers;
- The Benefits Awareness and Advice Scheme assists the elderly, those with disabilities and families on low income;
- Youth Initiative runs a range of activities including cycling, music, arts and sport as well as networking with local, county and national youth schemes;
- The Minibus service provides a flexible, accessible door to door service for people of any age without their own transport, and group hire;
- In addition we organise parish based lunch clubs, drop-in sessions and Tai-Chi for older people.

## **REVIEW OF DEVELOPMENTS, ACTIVITIES AND ACHIEVEMENTS**

### **Core Service**

The drive to make the Group less dependant on grants by involving more of the local communities continued during this year with an increase in membership, fundraising and trading activities. The minibus had a presence at both Heskett Show and Mungrisdale Fun day, we had a display at the Cumbria Community Foundation AGM, volunteers manned the Mosedale Meeting House coffee shop for nine weekends over the summer and the young musicians of Reverb played at many concerts. All of these should, we hope, raise awareness of the Group's activities.

But luckily funders are still keen to support our work and it was wonderful that the Loyds TSB Foundation for England and Wales offered to support the costs of the Group Co-ordinator for one year. Cumbria County Council is very supportive of the young peoples' activities and we are very lucky to have the support of the Joyce Wilkinson Trust. The Northern Rock Foundation and the Clore Duffield Foundation continue to fund the Lend a Hand Group and our Parish Councils, Neighbourhood forums and the Caldbeck Surgery Trust are still very much involved. Thank you to all.

Over the year the co-ordinator has taken part in many meetings concerned with Cumbrian and rural affairs, such as Neighbourhood forums, Community Transport Forums, Community Boards, Accessibility planning meetings, Fells and Dales Leader LAG, Age Concern and more. The great strength of the Group is its work on the ground by the co-ordinators and the marvellous volunteers but it is still very important to keep the needs of isolated and vulnerable people on the agenda of government and other organisations.

### **The Lend a Hand Group and Benefits Awareness**

From 1<sup>st</sup> April, 2007 to the end of March, 2008 the Lend a Hand volunteers have made a total of 385 visits. Of these, 68 were by the handymen, 283 by the personal/domestic volunteers and 34 were for medical loans. The handyman visits were quite varied and covered things from changing a hard-to-reach light bulb to splitting and stacking logs and un-jamming a swollen door. The personal/domestic volunteers also tackled a variety of tasks in addition to the regular visits for personal care and company and did some minor decorating, fruit picking, garden tidying and helping to clear out rooms. The number of medical loans continues to increase and this is proving to be a much-appreciated service. Unfortunately, a directive has recently come from the Red Cross stipulating that a non-returnable charge of £15 is to be made on each piece of their equipment loaned out, instead of relying on borrowers making a donation. However, we have in addition a small stock of our own equipment, which the Red Cross has agreed to service free of charge,

which we are happy to lend out where needed. A number of Lend a Hand/British Red Cross volunteers are to receive 5-year service awards at the Red Cross Volunteer Forum in May, 2008.

The number of active volunteers has fallen to 19, mainly due to people taking on full-time paid employment or having too many other commitments. At present there are 6 in Heskett Newmarket, 5 in Caldbeck, 5 in Ireby/Uldale, 1 in Boltons, 1 in Mungrisdale and 1 in Westward. However, we have not had to turn down any request for assistance to date. Earlier in the year it was interesting to note that in 2007, of the 42 individuals helped by Lend a Hand volunteers, 21 lived in Caldbeck parish, 5 in Ireby/Uldale, 5 in Sebergham & Welton, 4 in Boltons, 3 in Mungrisdale, 3 in Castle Sowerby and 1 in Westward.

In March, 2007, confirmation was received of funding for the LAH group to cover the following 3 years. In May, Joyce and Doreen attended an Age Concern Awareness Day at Ireby and provided information about the Northern Fells Group. During the summer, some of the volunteers were happy to help out with the running of the coffee shop at Mosedale, transporting items for sale on the craft and bric-a-brac stalls, as well as transporting people to sample the delights on offer. Once again large quantities of damsons and plums were picked and distributed to be sold in aid of funds, courtesy of the grower, whose generosity is much appreciated.

The LAH group continues to help with the running of the popular and very successful Tai Chi exercise classes with teacher Lesley Relph, with about 14 regular and very enthusiastic members attending on Wednesday mornings 10.30 – 11.30am in Caldbeck Parish Hall. Volunteers also help with the Lunch Groups and provide escorts when needed for disabled people using the minibus. On Thursday, 21<sup>st</sup> February the first of the Drop-in for tea and coffee sessions was held from 2 – 4pm at Ireby W.I. hall, with the first Millhouse session being held from 9.30 – 11am the following (Friday) morning, in conjunction with the minibus. Numbers at Ireby have not been promising, with 2 or 3 attending on most occasions, with a maximum of 9 on a day when the scrapping of the bus services was to be discussed in the hall. Numbers at Millhouse have been more encouraging. The times have been adjusted to 2.30 – 4pm for Ireby and 10 – 11.30am for Millhouse.

Meetings have been held with Hospice at Home managers and we are currently exploring ways in which some LAH volunteers can assist from time to time. A number of volunteers have expressed an interest in taking up the offer of Bereavement Support training from H at H and in helping out on an informal basis at some of their events to raise awareness.

Doreen and some of the volunteers from Ireby/Uldale and Boltons parishes are currently involved in establishing a First Responders Group to serve these areas. Fifteen First Responder volunteers are undergoing training and it is hoped that many will soon be ready to be assessed by the Ambulance Service. Members of the Caldbeck & Heskett Newmarket First Responders team have been very helpful and supportive, for which we are very grateful, and it is hoped that in the future both teams can benefit from shared training sessions etc..

Although the emphasis has changed on the type of service most in demand – e.g. no dog walking at the moment, but a squad of 5 (personal/domestic/Red Cross) have just tackled the first garden clearing job of the season - the demand is still there and still being met by our very conscientious and dedicated volunteers.

**The Benefits Awareness (and help with forms) Scheme** is part of the Lend a Hand Group's activities, with Antoinette Ward continuing to work for the Scheme.

The service has continued to be advertised from time to time in the parish newsletters, and is advertised in the Northern Fells Services leaflet. The District and Practice Nurses refer patients to the service and a number of Minibus passengers and Lend a Hand recipients know about the scheme too. The annual Newsletter is another source of raised awareness of the service.

When reviewing the service early in 2008 we discovered that the service is used proportionally more by people in Caldbeck parish than in the other six parishes. Antoinette will aim to publicise the service in the other six parishes over the next few months.

Antoinette attended a Bereavement Benefits Training Day organised by the Child Poverty Action Group in September 2007.

37 residents contacted the Benefits Awareness service from April 2007 to March 2008, of whom 19 were aged over 75 years. 30 residents were assisted with claim forms, some with two or more claim forms, and 12 were given other information, referred to other agencies or assisted with telephone calls to sort out a variety of concerns. £42,031-60p per annum in benefits was awarded to the 37 residents who had been helped with benefit claims. Of the above total £26,473-20p per annum was awarded to people over 75 years of age.

Information and assistance were given with:

Attendance Allowance	13
Disability Living Allowance	3
Incapacity Benefit	2
Sickness Benefit	1
Carer's Allowance	1
Social Housing application	2
Housing Benefit	1

Income Support	1
Small Business Relief for Council Tax	1
Blue Badge	4
HC1 (Help with health costs) form	1
Pension changes	1
Pension Credit	1
Careline Alarm application	1
Funeral Payment claim form	1
Residential Care	1
Occupational Therapist	1
Social Services	1
Winter Fuel Allowance	1
Heating grants	1
Home Care Survey	1
Special Educational Needs	1

Assistance was given with the Northern Fells Newsletter in Autumn 2007

**The Minibus service provided a flexible, accessible door to door service for people of any age without their own transport and also group outings.**

There are now twenty-seven voluntary drivers providing a 6 day a week service. The minibus is established as a flexible service for people without their own transport and those who need the disabled access. It also helps people during temporary periods of illness or disability and can relieve carers. The minibus takes people to both medically related appointments and social visits to friends, village activities, shopping etc. It brings teenagers home from school when they stay for sport or musical activities and miss the school bus. It takes older people to lunch groups. The service takes passengers out of the area to appointments or to public service connections for longer journeys.

The Youth Initiative also used the bus to provide transport to various activities such as golf, climbing and music events.

In this accounting year the bus made over 1470 passenger journeys covering 17,000 miles (miles with passengers on board).

The bus visited Hesket Newmarket Agricultural Show and Mungrisdale Fun Day.

**Youth Initiative.**

Good weather at the beginning of the year meant that the Easter activities were a huge success with a visit to the climbing wall in Keswick, orienteering below Carrock Fell, music, football and tennis. Forty local children plus two visiting cousins took part filling sixty-eight places.

Naturally enough the weather was not so clement in the summer holidays but we still packed in a great deal of activity over the six weeks. Sixty-nine children booked places on eighteen different activities such as breakdancing, circus skills, mountain-biking, drama, golf, folk music and more.

The drama workshops garnered enthusiasm for joining Caldbeck Players at Christmas in the totally home-grown production of Puss in Boots which was a real wow with the audiences and great fun for all those taking part.

Extra funding has enabled Alison Scott to work with the musical ambitions of more children and the Group now runs weekly sessions during term time for youngsters from 8-18 in Caldbeck and fortnightly ones for babies and pre-school children at Millhouse.

The musicians in Reverb had a very busy year packing in a great deal with learning new skills and performing. To begin with they worked with Andy Humpage to improve on their Samba which they then performed at Ireby Music Festival. They continued on through the year giving performances at L'al Fest at Theatre by the Lake, Maryport Blues Festival and Solfest.

The uncertain weather in June added a certain frisson to the organisation of the Medieval Event held in conjunction with Fellview School and Friends of Fellview but in the end the sun came out and the triumphant procession of St George paraded through the village. The young people put in a huge amount of work from the young thespians wearing real and very heavy chainmail, learning how to stage fights, and make their voices heard in the outside environment. The musicians made many intriguing instruments and practised all their songs and dances to perfection. The whole afternoon and evening was a huge success.

In the autumn Reverb turned its attention to the digital world and worked with Dave Roberts from Soundwave on using musictech. A grant from the Hadfield Trust had bought new drums, computer, editing and recording equipment and they used these with Dave to work on their Boombang drumming and songwriting skills. This spring the emphasis has been on Folk music.

## **FINANCIAL REVIEW**

### **Policy on reserves**

It is the policy of the charity to maintain unrestricted funds, which are the free reserves of the charity to enable them to guard against shortfall, undertake projects and to take advantage of opportunities that present themselves.

It is intended to build up the reserves for the replacement of the minibus by transfer from general reserves.

### **Review of the financial position of the charity**

This year has seen an excellent effort to build resources and strengthen the financial position. Although grant funding will continue to be necessary the Group is in a good position to deliver and expand its services.

### **Principal financial management policies adopted**

A financial report in the form of a profit and loss statement is circulated to the committee prior to each quarterly meeting.

A verbal overview is given by the treasurer of the overall financial position of the group together with details of any major items of income and expenditure that have occurred in the previous 3 months.

Any potential large business / operational expenditure or risk is discussed and agreed by the committee prior to any implementation.

An annual review is held with the independent examiner prior to the issue of the financial statements.

### **Principal funding sources and how expenditure in the year under review has supported the key objectives of the charity**

The Group has been funded through a mixture of earned income, donations and membership from its local communities. Grants have been awarded from funds supporting rural communities and sustainable development or from those that support care for the elderly and disadvantaged. The Minibus, Lend a Hand and Youth Initiative continue to provide much needed services to those members of the Northern Fells Community who face exclusion because of ill health, disability, lack of transport or low incomes.

## **FUNDERS**

- Northern Rock Foundation
- Lloyds TSB Foundation for England and Wales
- Cumbria Community Foundation-
  - o Joyce Wilkinson Trust
  - o Local Network Fund
- Cumbria County Council
- Lake District National Park Authority Sustainable Development Fund
- Caldbeck Surgery Charitable Fund
- The Clore Duffield Foundation
- The Hadfield Trust
- Allerdale Neighbourhood Forums
- Eden Neighbourhood Forums
- Boltons, Caldbeck, Castle Sowerby, Ireby & Uldale, Mungrisdale, Sebergham & Welton and Westward Civil Parishes.
- Lake District National Park Sustainable Development Fund
- Heskett Newmarket Brewery Fund
- Voluntary donations

## **RESERVES**

It is the policy of the charity to maintain unrestricted funds, which are the free reserves of the charity to enable them to guard against shortfall, undertake projects and take advantage of opportunities that present themselves.

