

# Helen Arkell



## Dyslexia Charity

### Annual Report and Financial Statements

For the year ended 31 August 2024

### Helen Arkell Dyslexia Charity

(a company limited by guarantee)

Registered Charity No. 1064646

Registered Company No. 3432423 (England and Wales)

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## Helen Arkell Dyslexia Charity

Report of the Trustees for the year ended 31 August 2024

Charity information and reference details

Registered Charity Number	1064646
Registered Company Number	3432423 (England and Wales)
Patron	HRH Princess Beatrice
Vice-Patrons	Susan Hampshire CBE Roger Jefcoate CBE
Trustees (Directors)	Michael-John Albert BCom (Hons), CA(SA), CA – Chair. Pete Watson BSc (Hons) – Vice-Chair. Liam McLaughlin ACMA – Treasurer - appointed 29.5.24. Laura Anthony BA (Hons), ATII. Joanna Dunbar-Webb BA (Hons), LLB, Dip Psych, MA, CIPD. Jennie Guise MA (Hons), BSc (Hons), MBA, MSc, PhD, PGCPSE, AMBDA FE/HE, MEd, CPsychol, CSci, AFBPsS, FHEA, SpLD APC (Patoss), EuroPsy – appointed 1.12.23. Gary Hay BA (Hons), MBA – resigned 7.2.24. Simon Hepher MRICS. Jonathan Hetherington BA (Hons), MSc (Ed), QTS. Geraldine Price PhD, MA (Special Education), BA, RSA Dip. SpLD, RSA Dip. TESL, AMBDA, SpLD APC – resigned 18.11.23. Mike Sicely BA (Hons), ACA. Alison Sutton BA (Hons).
Chief Executive	Andy Cook MA (Cantab)
Registered Office	Helen Arkell Dyslexia Charity 24, West Street Farnham Surrey GU9 7DR
Web site	<a href="http://www.helenarkell.org.uk">www.helenarkell.org.uk</a>
Auditors	Shaw Gibbs Audit Ltd 264 Banbury Road Oxford Oxfordshire OX2 7DY
Bankers	Lloyds Bank, 25 Gresham Street, London. EC2V 7HN

## Report of the Chair of the Trustees

I am delighted to present my report as Chair of Helen Arkell Dyslexia Charity for the 2024 financial year and what a year this has been for the Charity! Against a backdrop of financial and political uncertainty, high costs of living and challenges for the education and charity sectors, we have been able to stay true to our vision to empower people with dyslexia to achieve their goals. This has been a record-breaking year for Helen Arkell in several respects and the key highlights are set out below. This would only have been possible with the strong support and commitment from the wider Helen Arkell community, and I would therefore like to express my sincere appreciation to the management, employees, consultants, supporters, donors and Trustees.

What has stood out for me in this record-breaking year?

- We touched the lives of more people than ever, 4,434, with our various services. (2023: 4,148).
- We provided 1:1 support in the form of assessments, consultations, coaching, skills building and training to 1,816 people. (2023: 1,617).
- 2,618 parents, teachers, schools and workplaces received advice and tips on how to support people with dyslexia. (2023: 2,531).
- 610 individuals from low-income backgrounds and state schools received bursaries, our highest ever number of bursaries granted in one year. (2023: 504).
- We provided 5,049 hours of 1:1 tuition/coaching. (2023: 4,466).
- We continued to grow our provision of on-line services.
- We extended our outreach by providing specialist support to three prisons.
- We provided 111 teachers and teaching assistants from state schools in the UK with free training through the Theo Paphitis Dyslexia Bursary.

The measure of the positive impact Helen Arkell has had is reflected in the positive feedback from the people and communities that we have supported. One comment that really struck a chord was:

“We will be forever grateful for the bursary we received which helped us get the help our son desperately needed at a critical time in his life.”

Each donation, legacy, grant or funding-partnership matters and enables the Charity to improve the lives of people with dyslexia. To continue to do this we will need to increase the support of the wider Helen Arkell community even further, and especially our generous donors and sponsors whose contributions are greatly appreciated. Going forward, partnerships and strategic alliances, including exploring opportunities with likeminded organisations, will become increasingly more important. We are looking forward to continuing our work with Theo Paphitis and Ryman Limited in raising awareness about dyslexia.


In the previous year we revisited our vision, mission and purpose as well as setting the Charity's strategic direction for the next three years. This year we confirmed our objectives and strategic goals and during our strategy away day agreed a set of priorities for the year ahead. We are committed to expanding our footprint into wider communities across the UK with a focus on schools. Our outreach programmes for adults will continue with our various workplace initiatives and we will strive to expand our online offerings. As a reminder our vision, mission, values and purpose can be found at [www.helenarkell.org.uk/about-us/vision](http://www.helenarkell.org.uk/about-us/vision). The full strategy document is available on request.

We continue to invest in fundraising and we were pleased with the overall level of donations received throughout the year. We remain grateful to the Aegis Trust whose generous donation over several years has enabled us to embed and expand our fundraising initiatives. Despite recording a deficit this year, our overall unrestricted funds remain within the target range, and we have approved a break-even budget for what we expect to be a challenging 2025 financial year.

The Board of Trustees has seen a few changes this year. The previous Chair, Gary Hay, formally stepped down from the Board, and as noted in last year's report, his contribution has been immense. Mike Sicely gave notice that, for personal reasons, he will be stepping down from the Board after the AGM. Thank you, Mike, for your contribution as Treasurer, and we are delighted to welcome Liam McLaughlin to the Board as our new Treasurer. We will continue to assess the skills and expertise needed at a Board level and we have recently completed a detailed succession planning process for all key positions at the Charity.

I was delighted to attend our Thank You function for donors and supporters, very kindly hosted by our patron HRH Princess Beatrice at St James's Palace. It was an excellent opportunity to connect with the wider Helen Arkell community and to be moved by a firsthand account of how dyslexia impacts young people. HRH Princess Beatrice spoke passionately about her experience of dyslexia and Andy, our CEO, eloquently positioned the work we are doing and the difference we are making.

In these tough and uncertain economic times, the need to support people with dyslexia remains in high demand and we do need more funding for bursaries, tuition, and teacher training. Therefore, I will end with a final ask: to help us make an even bigger impact please continue to support or consider supporting Helen Arkell in 2025. Together we can help achieve our mission of removing barriers to learning, employment and life for people with dyslexia, by providing expert personal and life-changing support.

Signed by:  
  
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29 January 2025

Date.....

Michael-John Albert  
Chair of Trustees

## Report of the Trustees for year ended 31 August 2024

The Trustees who are also directors of the Charity for the purposes of the Companies Act 2006, present their report with the financial statements of the Charity for the year ended 31 August 2024. The Trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

### Governing document

The Charity is controlled by its governing documents, comprising its Memorandum and Articles of Association, and constitutes a limited company, limited by guarantee, as defined by the Companies Act 2006.

### Directors and Trustees

The Directors of a Charitable Company stand in place of the Trustees for the purposes of Charity Law, and throughout this report are collectively referred to as the Trustees. The Trustees at the date of this report and who served during the year are listed on page two.

The following trustees resigned within the year:

Gary Hay BA (Hons), MBA – resigned 7.2.24.

Geraldine Price PhD, MA (Special Education), BA, RSA Dip. SpLD, RSA Dip. TESL, AMBDA, SpLD APC – resigned 18.11.23.

The following trustees were appointed during the year:

Jennie Guise MA (Hons), BSc (Hons), MBA, MSc, PhD, PGCPSE, AMBDA FE/HE, MEd, CPsychol, CSci, AFBPsS, FHEA, SpLD APC (Patoss), EuroPsy – appointed 1.12.23.

Liam McLaughlin ACMA – appointed 29.5.24.

One fifth of the Trustees are obliged to offer their resignation at every 5<sup>th</sup> Annual General Meeting. This rule shall next apply at the AGM for the accounts to the year ended 2027.

We thank Geraldine Price and Gary Hay for their outstanding contributions during their terms of office, and the latter for his stint as Chair, notably guiding us through the challenges presented by the Covid-19 pandemic. We are delighted that both will continue to keep in close touch with us as part of the Helen Arkell community, albeit not officially as Trustees.

Trustees are appointed based on having the necessary and relevant skills to offer help and guidance to the Chief Executive and staff of the Charity.

New Trustees undergo an induction programme to introduce them to the Charity, their legal obligations under charity and company law, the content of the Memorandum and Articles of Association, the Board decision-making process, the strategic plan and recent financial performance of the Charity. Trustees are encouraged to attend appropriate external training events where these will facilitate the undertaking of their respective roles, and to participate in events that are run by the Charity. We are satisfied that the trustee body is afforded ample training in order to fulfil its duties and responsibilities.

No Trustee has any beneficial interest in the company. All Trustees are members of the company and guarantee to contribute £1 in the event of winding up.

Each year, after due consideration, the Trustees approve a budget presented by management for income and expenditure for the coming year as well as reviewing the Charity's reserves in relation to its reserves policy. Trustees approve policies and monitor their execution through reports from management at quarterly Trustees' meetings.

The Trustees are responsible for setting the remuneration of the Chief Executive in the light of prevailing economic conditions.

### About dyslexia

Dyslexia is a learning difficulty that primarily affects the skills needed for accurate and fluent reading, writing and spelling. Dyslexia can also affect 'working memory', cognitive processing and organisational skills. There are many other symptoms and no two people with dyslexia are the same. Dyslexia can range from mild to severe, and affects people regardless of intellectual ability. Dyslexia is highly hereditary, and affects 1 in 10 people in the UK.

Children and adults with unsupported dyslexia are more likely to suffer low self-esteem, low confidence, to have negative associations with education and achieve fewer qualifications, to become unemployed when leaving school, and to make negative life-choices. (People with dyslexia are twice as likely to end up in prison or young offender institutes).

### Support

If correctly supported, people with dyslexia can thrive in life, particularly life after school, where their ability to see the world differently can be a positive asset. Famous, 'successful' dyslexics such as Richard Branson are good examples. The more such people speak openly about their dyslexia, the more their examples will serve to encourage others. Key dyslexic strengths are well-documented and it is becoming increasingly acknowledged that these strengths will become particularly valuable in tomorrow's workplace.

### Our role

At Helen Arkell Dyslexia Charity we believe that the first step in helping people with dyslexia and other specific learning difficulties to maximise their opportunities, is to gain better self-understanding by means of specialist dyslexia assessments with personalised recommendations for appropriate ways forward. The second step is to implement these recommendations, ensuring the individual gains access to the extra help they need, either with one-off adjustments or programmes of on-going specialist support. The third step is to up-skill and educate teachers, classroom assistants, parents, employers and members of the public so that they are better able to provide support to people with dyslexia.

Outcomes for beneficiaries include:

- improved self-awareness, with better understanding of individual strengths and weaknesses.
- improved self-empowerment.
- improved access to practical specialist support and 'reasonable adjustments'.
- improved self-confidence and mental well-being.
- improved literacy and attitude to learning.
- reduced frustration.
- reduced anxiety.
- improved life-opportunities.

Currently, it is difficult for families from lower-income backgrounds to access the help they need, both because of availability of high quality service and because diagnostic assessments and specialist tuition are expensive.

At Helen Arkell Dyslexia Charity we aim to remove these barriers, helping dyslexic children and adults to thrive in today's world and prevent their talent from being wasted.

A key aim is to provide bursary-funded support to increasing numbers of beneficiaries from lower-income backgrounds. On average, a donation of £530 can provide an individual with the help they need, to change their life for the better and find a new positive way forward that maximises their potential.

Where beneficiaries can afford to pay for the service, or feel able to make a contribution towards costs, this is accepted, as it means that restricted bursary funds can benefit more of those people who need it most.

## Objects and activities

### Our Objects

The charitable objects of the Charity, as set out in its Memorandum of Association\*, are:

- a) "to provide for the care, education and treatment of persons suffering from dyslexia or any other related specific learning disability";
- b) "to further the education of the public, teachers and other related professions about dyslexia and other related specific learning disabilities and to educate and train the public, teachers and other related professions about the care, education and treatment of such persons";
- c) "to carry out research into dyslexia and other related specific learning disabilities and to disseminate the useful results of such research".

### Our Vision

Our vision is a world in which people with dyslexia are empowered to achieve their goals.

### Our Mission

Our mission is to remove barriers to learning, employment and life for people with dyslexia, by providing expert, personal and life-changing support.

### Our Purpose

Our purpose is to empower children and adults with dyslexia.

\* The wording of the objects that were registered when the Charity was founded reflects the language that was in use at that time.

## Putting people with dyslexia at the heart of everything we do



### Our activities

We achieve our mission through the following main activities:

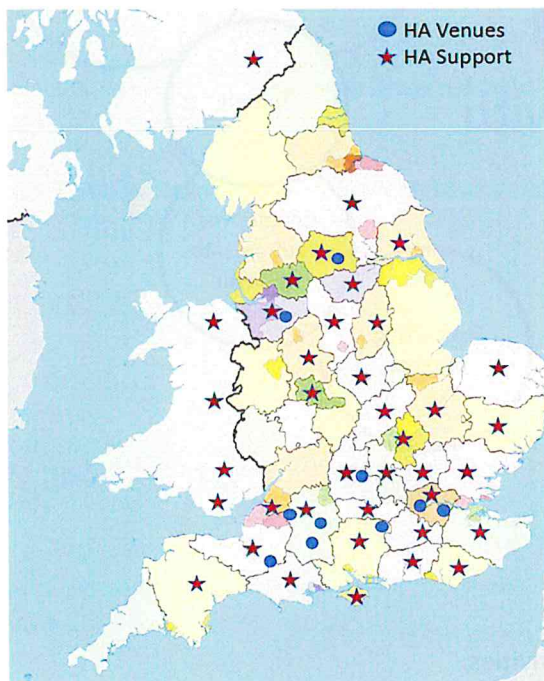
- i) by providing specialist consultations and assessments to children and adults to determine whether dyslexia or other related specific learning difficulties are playing a part in preventing them reaching their full potential. Advice is then provided to determine the best way forward for the individual concerned. These life-changing sessions are conducted by qualified Helen Arkell specialist assessors and registered educational psychologists;
- ii) by providing 1:1 coaching, tuition and skills-building to children and adults who have been identified as affected by dyslexia. These sessions are delivered by our qualified specialist staff;
- iii) by providing specialist training to teachers, teaching assistants and other interested parties such that they become qualified to support children in schools and local communities. We are a registered training centre for teachers and teaching assistants wishing to specialise in the support of pupils with dyslexia and specific learning difficulties.

In addition, we:

- provide advice, help and teaching to parents whose children are/may be on the spectrum for dyslexia or other specific learning difficulties.
- provide specialist dyslexia awareness training to workplaces who employ people with dyslexia.
- provide specialist dyslexia awareness training to schools through in-service and other training days.

- run a variety of specialist courses including touch typing courses for children with dyslexia, Spotlight workshops covering a variety of topics, and 'Supporting Learners' courses for teachers and teaching assistants; GCSE preparation courses and a variety of other courses for children, young people and adults with dyslexia, as well as for other interested parties who either work or live with someone with dyslexia.

## Geographical spread



Our main operating base over recent decades has been near Farnham, close to the Surrey/Hampshire border, largely accessing people in the nearby counties.

In furtherance of our strategic plan, we have expanded on our mission to access a much larger footprint.

We are delighted that this year we gained a foothold in the North of England, with dyslexia specialists in Cheshire and Yorkshire, adding to our existing network of venues across the South of England.

Residents of 38 different counties of the UK received 1:1 support from us in 2024 (2023: 38)

## Achievements and performance

### Summary

We grew our charitable activity during the year, extending our services to 4,434 beneficiaries (2023: 4,148), which constitutes a new record for the Charity.

Of the above, 1,816 received 1:1 support (2023: 1,617).

Another 2,618 beneficiaries attended our various courses (2023: 2,531).

In total, a record breaking 610 people benefitted from bursary-funded support (2023: 504). Of these, 499 individuals from lower-income, disadvantaged families received 1:1 specialist help amounting to £260,111 (2023: 456 individuals received £238,422). In addition, 111 state school teachers and teaching assistants received bursary-funded dyslexia related training (2023: 48), at a cost of £30,000. This increase in support of state school educationalists was made possible through the generosity of the Theo Paphitis Dyslexia Bursary.

We now describe progress that was made this year specifically in relation to the 'plans for the future period' that were detailed in last year's Annual Report and Financial Statements.

Our targets set last year were as follows:

**Target 1: In line with our mission to remove barriers to learning and life for people with dyslexia by providing expert, personal and life-changing support, we aim to increase the numbers of people with dyslexia whom we help during the year ending August 2024.**

**Outcome:**

We succeeded in supporting a total of 4,434 beneficiaries during the year, with our various services (2023: 4,148), which constitutes another record for the Charity.

Of the above beneficiaries, 1,816 received 1:1 support for their dyslexia during the year (2023: 1,617) through our team of specialist staff and educational psychologists, by means of 1:1 assessments, consultations, coaching and tuition. It is pleasing to have supported more people in this way than in the previous year, as so many individuals with dyslexia reached out to us for help.

Assessments, coaching, consultations, and tuition sessions were again offered as an online service, via video call, if this suited the client, resulting in 15% of services being delivered in this way.

90% of our beneficiaries during the year were children and young people, and 10% were adults, reflecting our determination to be available to people with dyslexia at any stage of their lives.

Of our 1,816 beneficiaries of 1:1 support, 1,355 received assessments (2023: 1,227) and 461 received 1:1 tuition, coaching, skills-building and consultations (2023: 390). Our team of specialist tutors provided 5,049 hours of 1:1 coaching sessions throughout the year (2023: 4,466). This is the first year we have provided more than 5,000 hours of coaching/specialist teaching to individuals with dyslexia.

Of those beneficiaries who were provided with assessments, 82% were assessed by Helen Arkell specialist assessors and 18% were assessed by our team of educational psychologists.

During the year assessments were provided at the following venues:

51% at the Charity's head office (2023: 46%).

21% in situ in schools (2023: 23%).

15% via video call (2023: 18%).

7% at the Charity's London venues (2023: 8%).

5% at the Charity's Oxford venue (2023: 3%).

1% at assorted other venues including the Charity's Amesbury, Bath, Cheshire, Salisbury, West Yorkshire and Yeovil venues and the homes of assessors. (2023: 2%).

**Target 2: We plan to provide bursary-funded specialist support to even more disadvantaged people with dyslexia from lower-income backgrounds in the year ending August 2024 than we did in the previous year (2023: 504).**

**Outcome:**

Whilst we are pleased to have outperformed this target and set another record for the Charity, we are only sorry that there are still so many people with dyslexia who are struggling so badly and in need of our help, which makes us all the more determined to expand our services over the coming

years. This year we allocated record-breaking amounts of bursary-funded support to 610 people in total (2023: 504). Of these, 499 individuals from lower-income, disadvantaged backgrounds received bursary-funded support at a cost of £260,111 (2023: 456 individuals at cost £238,422). These individuals received whatever specific services they required, on a case-by-case basis, including dyslexia assessments, coaching and tuition, consultations and attendance on courses. In addition, 111 state school teachers and teaching assistants received bursary-funded dyslexia related training at a cost of £30,000, thanks to the generosity of Theo Paphitis and Ryman Limited, who set up the Theo Paphitis Bursary for this purpose.

30% of the beneficiaries who received assessments from the Charity this year were from disadvantaged socio-economic backgrounds.

18% of beneficiaries who were assisted with 1:1 support through our bursary system were adults, typically out of work or on lower incomes and on benefits, who believed that dyslexia was preventing them from finding work or achieving the career success that they hoped for.

82% of recipients of our 1:1 bursary-funded support during the year were children. In all cases, their families were already struggling to make ends meet financially, without also considering the extra requirement to source specialist support for their children, to address their suspected dyslexia. The majority of the children we supported through the bursary system were from single-parent families, typically with the parent or carer out of work, or on lower income, on a variety of benefits, qualifying for pupil premium ('free school meals') or in debt. We also supported a number of children who were in foster care due to a variety of complex domestic issues.

All applications to our bursary system were carefully assessed by the Bursary Review Panel before a decision was made regarding the degree of assistance that would be provided. The degree of need of each individual, and their financial circumstances, were considered on a case-by-case basis.

In line with our strategic plans, we aim to further increase our support of people from lower-income, disadvantaged backgrounds in the coming years. The effects of the recent Covid-19 pandemic are long-lasting and continue to cause significantly increased applications for our bursary-supported help. This is due to dyslexic children and adults having struggled during periods of home-schooling and working from home, away from their normal support systems. In addition, low-income and disadvantaged families have particularly reached out for help due to increased financial difficulties in the world at large.

We recognise that it is only because of the generosity of our donors that we are able to provide bursary-funded specialist support. We are indebted to all who made contributions to our work this year, enabling us to support our beneficiaries in this way.

**Target 3: We aim to build upon previous projects that have specifically supported teachers and teaching assistants from the state school sector, as part of our overall strategy to reach disadvantaged communities.**

#### Outcome:

Thanks to the generosity of TV Dragon, Retail Entrepreneur and longstanding dyslexia champion Theo Paphitis and Ryman Retail Limited we achieved this target. The Theo Paphitis Dyslexia Bursary

was launched in Autumn 2023, from which free training is provided to teachers and teaching assistants from state schools around the UK, particularly where there are high numbers of children on pupil premium (free school meals). A total of 111 state school representatives had already benefitted from this training by the close of the year. All attended the Charity's 6-week online course entitled "Supporting Learners with Dyslexia/SpLDs", which enables them to better support learners with dyslexia back in their classrooms. This course provides 18 hours of training by our expert team and is accredited by the CPD Standards Office. The fact that it is delivered online, and recorded, means that participants come from far and wide.

The following comment is typical of those applying to attend: *"I work as a TA with Pupil Premium children on a 1:1 and small group basis to help raise their attainment levels in reading, writing and spelling. I haven't previously received any formal training on dyslexia so I would love to learn how best to support children with dyslexia. I have a keen interest in improving my working knowledge in this area."*

**Target 4: We aim to launch a pilot Prison Project, offering our specialist expertise for the benefit of prisoners and prison staff alike. From this pilot, it is hoped that longer-term projects will be developed.**

**Outcome:**

We were pleased to launch not just one, but three Prison Projects, in which we partnered with the Neurodiversity Support Managers at HMP High Down in Surrey (men's Category C prison), HMP Downview in Surrey (women's closed prison), and HMP Lincoln in Lincolnshire (men's Category B prison).

In all three settings introductory meetings took place to scope out the best way to provide dyslexia support, and 2-hour workshops were provided as an initial "Introduction to Dyslexia". Attendees included prisoners with a special interest in dyslexia, many of whom were helping other prisoners to read through the Shannon Trust's learning programme. Others were prisoners who had been selected as mentors within the prison setting. Prison guards, administrative staff, and other agencies also attended, including those connected with employment and educational opportunities.

In total, 92 individuals attended the above sessions, across the three prison settings.

Building upon the success of the initial "Introduction to Dyslexia" workshops, our team returned to undertake "dyslexia audits" of HMP High Down and HMP Downview, to help suggest ways in which the physical premises, and the systems, could be made more dyslexia friendly for all concerned.

The next stage in our programme of support is to develop a bespoke in-depth course which will be delivered to selected individuals at HMP High Down, over a number of weeks, in the coming year. It is hoped that this will further embed dyslexia awareness within the prison setting.

We are currently viewing the above projects as pilots, as we develop bespoke packages of support to different settings, whose requirements will vary. Funding is being sought to help take this forward.

**Target 5:** We aim to increase the numbers of beneficiaries who benefit from support through online and videocall services.

**Outcome:**

The numbers of beneficiaries who benefited from support through online and videocall services remained broadly similar this year to last, with over 200 assessments taking place online for the second year running, and over 1,000 hours of tuition taking place online, which is a new record for the Charity. In percentage terms, 15% of assessments took place online this year (2023: 18%), and 27% of tuition sessions (2023: 25%). All consultations took place either online or by 'phone.

The decision as to whether sessions take place face-to-face or online are taken on a case-by-case basis to ensure the beneficiary receives the best possible service for their individual circumstances. This will not only take into account the age and concentration abilities of the beneficiary, but also other factors such as the beneficiary's location, and the degree to which they would feel more relaxed conducting the session from the comfort of their own home (or workplace) as opposed to travelling to unfamiliar surroundings. It should be noted that assessments are generally one-off events, whereas tuition normally takes place over a number of weeks and requires a more regular commitment. The above can have a bearing on whether online or face-to-face works best.

The Charity continues to provide a range of courses, the majority of which take place online, with recordings available. In today's world, this mode of delivery suits the majority of people, whose time commitments are increasingly pressurised. The main exceptions to the above rule are courses where a face-to-face element is preferred, such as the Level 5 and Level 7 Diploma Courses, where the Charity partners with several local schools in order to provide the necessary teaching practice opportunities for students. Touch Typing courses for children are also provided face-to-face, as are certain other courses.

**Target 6:** We will continue to explore opportunities for strategic partnerships with other organisations whose aims and objectives align with our own, for the ultimate benefit of people with dyslexia across the UK and beyond.

**Outcome:**

We fulfilled this target by keeping lines of communication open and transparent between Helen Arkell and the British Dyslexia Association to ensure that between us, we benefit our respective beneficiaries across the UK, and do not inadvertently duplicate our efforts. We also agreed to explore opportunities to work together whenever opportunities may arise.

We commenced discussions with Ark Schools, with a view to providing support to their teachers, classroom assistants, SENCos and learners. Ark Schools have a particular focus on opening their doors to high numbers of learners from disadvantaged backgrounds, across their 39 schools (30,000 learners, based at schools in Birmingham, Hastings, London and Portsmouth), so our respective organisations have a shared interest in providing help to families who need it most.

We also explored opportunities for working with the team at GoLexia Limited, based in Wales, although we ultimately decided not to proceed at this time.

## Additional activities in pursuit of our Mission:

In addition to meeting our plans above, as set out in last year's Annual Report and Financial Statements, we also achieved the following activities this year:

- [Providing dyslexia-related courses to 2,618 attendees.](#) 2,618 people attended our various courses during the year, as described below (2023: 2,531).
- [Providing inservice training in dyslexia awareness to 440 school representatives.](#) 440 teachers, learning support assistants and parents attended a total of 9 in-service days provided by our specialist staff at a variety of different schools, learning how to more effectively support pupils with dyslexia and other specific learning difficulties.
- [Providing the Helen Arkell year-long Level 5 Diploma in Teaching Learners with Dyslexia/SpLD to 39 students, and the Level 7 Diploma in Teaching and Assessing Learners with Dyslexia/SpLD to 21 students .](#) A total of 60 teachers, teaching assistants and other interested parties enrolled for our Level 5 and Level 7 diploma courses.
- [Providing a variety of short courses in dyslexia-related matters to 308 attendees.](#) A total of 308 people attended short dyslexia and SpLD-related courses in the year, including Study Skills, Touch Typing and Supporting Learners with Dyslexia, and how to better support children with ADHD and other issues. Our thanks again go to Theo Paphitis and Ryman Limited for sponsoring many state school teachers and teaching assistants through the Supporting Learners course, as mentioned above (Target 3, page 11).
- [Providing courses/training to 657 parents of children who have dyslexia.](#) 657 parents accessed our various courses, designed to provide helpful hints and tips for supporting family members with dyslexia. In some cases this included foster parents and/or grandparents who had taken on the role of care-givers. Courses included our HELP Parents course, as well as specific sessions on particular topics of specialist interest. As with all our courses, these have mainly been switched to online provision since the pandemic, for improved ease of access, although some face-to-face courses are provided, to maintain the element of choice. Many participants were specifically from lower income backgrounds and benefitted from bursary-funded support.
- [Providing dyslexia awareness training to 284 employees within the workplace.](#) We continued to provide dyslexia awareness training to workplaces, as well as ad hoc support when our specialist advice was required. 284 employees benefitted from this training at time of delivery, with many more accessing recordings after the event. This year we worked with companies including the General Medical Council, Novuna, Pinsent Masons LLP, Surrey Care Trust and Wates Construction.
- [Providing Spotlight workshop sessions to 777 participants.](#) 777 people joined us to improve their knowledge in a whole host of dyslexia-related topics throughout the year. Many participants were our alumni undertaking continuing professional development. We are proud to top up the learning of our alumni, keeping their skills at the cutting edge of the dyslexia world.
- [Supporting disadvantaged communities, where dyslexia is prevalent.](#) This year, as mentioned above, we supported 92 individuals in 3 prison settings, with dyslexia awareness

training (See Target 4, page 12).

- **Research.** In pursuance of our aim to help push back the boundaries of knowledge regarding dyslexia-related issues, we were pleased to help to source participants for a number of research projects during the year and to work with several universities, and particularly to act as a research partner with the University of Surrey.
- **Dyslexia Hub, University of Buckingham.** We were delighted to also partner with the University of Buckingham, helping them to set-up a Dyslexia Hub, as a centre of excellence for the support of students with dyslexia and other neurodiverse learning styles. Our role is to lend our expertise as required. This initiative is the brainchild of Roger Jefcoate CBE, who brought our two organisations together in his position as Honorary Doctor of the University and newly-appointed Vice Patron of Helen Arkell Dyslexia Charity.
- **Raising awareness.** We were proud to play our part in raising awareness at government level by participating in the All Party Parliamentary Group on Dyslexia and Other Specific Learning Difficulties, working alongside other leading organisations in the field of dyslexia.

We were also represented on the boards of the following groups, with whom we jointly raise awareness to the public and ensure standards within the field:

- the Council for the Registration of Schools Teaching Dyslexic Pupils (CRSTeD)
- the BDA Accreditation Board
- the SpLD Assessment Standards Committee (SASC)

We make special mention at this point of Brendan Wignall, chair of CRSTeD, who sadly passed away this year, all too young, after an ongoing battle with cancer. We will play our part in ensuring the work of CRSTeD continues, as Brendan would have wanted.

This year we were again represented at The Dyslexia & Dyscalculia Show, which was held at the National Exhibition Centre in Birmingham again this year, and at the TES SEND Show which was held at the Business Design Centre, London.

- **Playing our part in keeping children safe.** At Helen Arkell we take our practical safeguarding responsibilities seriously, 'doing our bit' to keep children safe. Inevitably, when providing 1:1 support to 1,816 individuals with dyslexia this year, there were occasions when children chose to confide in our team of specialists about things that were transpiring in their personal lives. In all instances where such information raised any safeguarding concerns, our team handled the information with great sensitivity and professionalism, and reports were submitted through the appropriate channels whenever necessary. We are proud to play our part in keeping children safe, in a world where risks can exist whether online or elsewhere, and we are aware that as independent 1:1 specialists, children may sometimes find it easier to confide in our team than with people whom they see every day.
- **Diversity.** We are determined that everyone will see themselves represented within the Helen Arkell community, regardless of where they come from, how they identify and how they think. This year, for the first time we were able to record that 17% of the beneficiaries to whom we provided dyslexia assessments described themselves as not being 'White British/English/Welsh/Scottish/Northern Irish.'

- **Fundraising.** We completed the sixth full year of our fundraising strategy, building upon previous progress that has been made.
- **Trusts & Foundations.** We are indebted to the generosity of more Trusts and Foundations than could possibly be mentioned individually. However, this year it is only right that we pay special tribute to Susan Hampshire MBE, whose efforts have resulted in over £100,000 of donations from Trusts, Foundations and individuals since joining us as Vice-Patron, including £45,000 from one Trust in this financial year alone. At the same time we again make special mention of The McGreevy No. 5 Settlement and The Linbury Trust for their ongoing generosity over a number of years. We are delighted to have started multi-year partnerships with The Borrows Trust, The Garfield Weston Foundation, the Hampshire Dyslexia Association, and the Wiltshire Community Foundation as well as receiving generous support from The National Lottery Awards for All, the Boshier-Hinton Foundation, the Norton Rose Fulbright Charitable Foundation and the Peter Harrison Foundation. It would be impossible to mention every single Trust or Foundation that supported us in the year, but you know who you are, and we are immensely grateful for your help in enabling us to fulfil our Mission. We thank all our donors, large and small, for supporting our work this year. Thank you!
- **Theo Paphitis Dyslexia Bursary** As detailed above (Target 3, page 11) we were delighted to launch the new partnership with Theo Paphitis and Ryman Retail Limited this year. We will share this charity partnership with the British Dyslexia Association, benefitting equally from donations that materialise, and between us making life better for people with dyslexia across the UK.
- **Community groups, clubs, associations and companies.** We have been very touched by the support from our local communities this year, including a wide variety of groups, clubs, associations and companies. Some community groups have chosen to support our work in Surrey while others have particularly wished to support our help of beneficiaries in other regions of the UK (see Geographical Spread, page 9). Whatever your particular area of interest, we are immensely grateful for your help and generosity in enabling us to fulfil our mission, reaching out to an ever-wider community of beneficiaries across the UK. This year we again make special mention of Tesco for your support through your Community Grants Scheme. We thank all of those organisations who have helped us to raise voluntary income this year.
- **Challenge events.** Our sincere thanks go to the six intrepid challenge event participants who raised funds in aid of Helen Arkell in the London Marathon, and our seven participants in the Royal Parks Half Marathon. We also thank all our other challenge event supporters, who raised funds for us in a variety of different ways throughout the year. Participants in all these challenges threw themselves into fundraising with great enthusiasm, which was greatly appreciated by the Charity, and by those whom we serve.
- **Tea Party at St James' Palace.** 2024 included a landmark date in the Helen Arkell Dyslexia Charity history, as our royal Patron, HRH Princess Beatrice, hosted a tea-party for a cross-section of the Charity's warmest supporters, at St James' Palace. This was a way to say Thank You to our community for everything they do for us, and to bring everyone up to date with our latest achievements, and plans for the future. We cannot thank Princess Beatrice enough

for this wonderful occasion, which will stick in the memories of everyone present for a very long time.

- **Other events.** We are very grateful to all who took part in our annual Golf Day, again held at Worplesdon Golf Club, raising funds whilst also enjoying an amazing day's golf. We were oversubscribed this year, due to the popularity of this event and the determination of our golf-minded supporters to help raise much-needed funds. Our Big Walk for Dyslexia again took place in Farnham, with the route beginning and ending with refreshments at our Centre. The sun shone and everyone enjoyed the self-guided route through this beautiful Georgian market town. We again counted ourselves as extremely fortunate to receive invitations for some of our volunteers and frontline staff to attend HRH The Princess of Wales's very special Christmas Carol Service in Westminster Abbey. This proved to be an extremely memorable occasion for all concerned, and we feel proud that our charity was represented at such an occasion, thanks to the patronage of Princess Beatrice. Other events included our annual Christmas Drinks for our local community; our annual Graduation Ceremony for all the successful graduates of the Level 5 and Level 7 Helen Arkell Diploma Courses, and various informal get-togethers for the wider Helen Arkell team.
- **Friends of Helen Arkell.** We take this opportunity to also thank all those individuals who supported our work through the Friends of Helen Arkell club this year by signing up to small regular donations. Lots of small donations can make a big difference to a charity such as ours, and we really appreciate your support. Our aim is to significantly increase the number of our Friends in the coming years. Friends are invited to our events and gain a 'behind the scenes' viewpoint of the Charity's work and progress.
- **Gifts in Wills.** This year we received notifications from various of our supporters that they have nominated Helen Arkell Dyslexia Charity to receive a gift in their Will. We are immensely grateful to all of you. Thank you! Gifts in Wills can make a lasting difference to our ability to make life better for people with dyslexia, not just now but also long into the future.
- **Donations in memory.** This year we were also fortunate to receive several donations in memory of loved ones whose lives had been positively affected by the Charity's work. Again, we are so grateful for donations in memory of loved ones, which enable us to carry on our work well into the future.
- **Capturing images of our beneficiaries.** We launched a competition whereby our beneficiaries could apply to become the 'faces' of Helen Arkell, representing a cross section of people approaching us for support, with their various different personalities, backgrounds and personal interests. We are immensely grateful to Charlotte Allcock for volunteering to conduct the photo shoots, and the resulting pictures will be used in the Charity's publicity going forwards. Over time, we will build up a larger bank of images, showing the breadth of the Charity's community of beneficiaries.
- **Strategic Plan and ambitious aims.** Our annual strategy day, involving Trustees and staff, reviewed the Charity's strategic plan and confirmed our bold and ambitious goals for the next three to five years. Building on solid foundations our strategy has at its core a desire to provide an ever broader and deeper offer of support to people with dyslexia and those around them, regardless of ability to pay. Our goal is to increase the reach and impact of our

support across the UK. Such growth requires secure operational and financial underpinning, and good relationships with potential partners that can help us achieve our aims.

To ensure that our strategic objectives are met the Board has put in place a series of portfolios to be managed by the leadership team and Trustees (as volunteers). Each team has identified guiding objectives for their specific portfolio. This approach allows Trustees to contribute to the strategy in a meaningful way using their diverse talents and skills.

Our vision, mission, values and purpose can be found at:

[www.helenarkell.org.uk/about-us/vision](http://www.helenarkell.org.uk/about-us/vision). The full strategy document is available on request.

- **Operating with due consideration for the environment.** We are committed to limiting our impact on the environment and we take this into consideration whenever making decisions on the Charity's behalf.

### The Helen Arkell team

- **Our volunteers.** All charities appreciate the contribution of volunteers and we are no different. Special mention of all our volunteer fundraisers who took on various challenges during the year, mentioned above. Perhaps the biggest thank you should go to our dedicated unpaid Trustees, however, who give their time freely as volunteers in support of the Charity's aims, and again went above and beyond the call of duty this year.
- **Our staff.** We thank our amazing staff for their dedication, expertise, hard work and good humour, living our values of professional excellence with warmth and the personal touch. It is through our staff that we fulfill our mission each and every day, changing the lives of a growing number of individuals with dyslexia.
- **Our beneficiaries.** We thank all those 1,617 people with dyslexia who have come to us for 1:1 help this year. It is you who give us the inspiration to fulfill our mission, recognising every day that people with dyslexia bring exceptional qualities. We are proud to help you find out more about yourselves, and to help you forge new ways forward in life that will play to your strengths. We hope you will never look back, but if you do, we are here to help you whenever you need us. Above all, we hope you will be empowered to believe in yourselves, achieve your goals and succeed on your own terms.
- **Our Patron, Her Royal Highness, Princess Beatrice.** We are honoured that Princess Beatrice continues to act as our Patron. Dyslexic herself, Princess Beatrice understands our mission from a very personal perspective, and is a brilliant asset in raising awareness of the positive aspects of dyslexia in general, and the Charity's work in particular. Again, as above, we thank Princess Beatrice particularly this year, for welcoming the Helen Arkell community to St James Palace.
- **Our Vice-Patrons, Susan Hampshire CBE, and Roger Jefcoate CBE.** We are delighted to have Susan Hampshire CBE as Vice-Patron of the Charity, and to have also been joined this year by Roger Jefcoate CBE. Susan, Lady Kulukundis, née Hampshire, is an English actress known for her many television and film roles, including *The Forsyte Saga*, *The First Churchills*,

Vanity Fair, The Pallisers, The Grand, Monarch of the Glen and others too many to mention. Dyslexic herself, and a renowned advocate for the rights and opportunities of people with dyslexia throughout her life, Susan was a good friend of our founder, the late Helen Arkell MBE, and is ideally suited to hold the role of Vice-Patron of the Charity, as we make progress with our plans.

Roger Jefcoate CBE has spent a lifetime working to make life better for people who have disabilities, starting in his teens when he worked with Ludwig Guttmann, the founder of the Paralympics, to pioneer life-changing independence technology for severely disabled individuals at Stoke Mandeville Hospital. Since then, Roger has been involved in, and co-founded, many life-changing charities, including AbilityNet, Canine Partners, Demand, ME Research UK, Medical Detection Dogs, Mobility Trust and the Roger and Jean Jefcoate Trust, to name just a few. Roger assisted in the development of Helen Arkell Dyslexia Charity in its early days, bringing prospective supporters from London to visit the Charity's Surrey headquarters in the 1990's. We are delighted he has now agreed to become a Vice-Patron.

## Public benefit requirement

The Trustees are aware of the requirement to demonstrate public benefit, as set out in the Charities Act. Having due regard to the Charity Commission's guidance on public benefit, the Trustees are confident that the Charity's services meet these criteria, for all the reasons detailed above in the description of our aims, objectives and activities.

1,816 children, young people and adults benefitted directly from the Charity's services this year, in a 1:1 setting, whether face-to-face or by video call, and countless more people benefitted indirectly through their contact with teachers, teaching assistants and other interested parties who have received training in dyslexia awareness from our Charity.

2,618 people attended the Charity's courses during the year, ensuring that they were better equipped to support people with dyslexia in their daily lives, whether in the home, at school, in the workplace or in other communities.

We supported disadvantaged communities, with a record-breaking 610 people benefitting from bursary-funded support. Of these, 499 individuals with dyslexia from lower-income backgrounds received bursary funded support amounting to £260,000. In addition, 111 State School teachers and teaching assistants received bursary-funded dyslexia related training, so they could better support learners with dyslexia in their classrooms.

We are committed to further increasing our reach and impact in the coming years, with a determination to increase our regional spread, increasing the number of our potential beneficiaries and particularly focusing our efforts on providing further assistance to people with dyslexia and other specific learning difficulties who are from lower-income backgrounds.

## What our beneficiaries say

In a recent survey of 302 beneficiaries of bursary-funded support, respondents told us the following:

- 98% of respondents agreed that having a dyslexia assessment helps the person to understand themselves better, including their strengths and weaknesses.
- 98% of respondents agreed that having a dyslexia assessment helps you to access further support.

- 94% of respondents reported that the initial assessment led to improved confidence.
- 96% of respondents reported that the assessment led to reduced frustration and anxiety.
- 88% of respondents reported that the assessment led to improved literacy.
- 100% of respondents said they would recommend Helen Arkell Dyslexia Charity to a friend.

### These are some of their comments:

“Your help has been absolutely fundamental in ensuring that my daughter is able to receive the right support for her education now, and in the future. The school informed me about Helen Arkell. I was so grateful to hear back from the Helen Arkell team, and everyone was so kind and helpful. My daughter came for an assessment, and was made to feel so at ease, and she wasn’t just being examined. We received her diagnosis, which has been a massive help and boost to her learning, as she moved into a higher school setting. She doesn’t feel as though she has to explain herself anymore, and knows she might struggle understanding certain things; but she has the confidence to ask for additional help now. I cannot thank Helen Arkell enough for making such a difference to my daughter’s well being.”

“Your help has been absolutely fundamental.”

“The assessment has given my son that light bulb moment! Since his assessment he has been kinder to himself because he understands why he struggles while many other children in his class do not. His teachers have taken the assessment seriously, and since then have provided impactful adjustments. The assessment has also helped me talk to my son in a more helpful way enabling him to see his whole person aptitudes. He also sees that he has abilities in visual spatial areas that others do not, giving him awareness of the bigger picture when it comes to humans and useful skills. Thank you!”

“The assessment has given my son that light bulb moment!”

“I am so pleased and grateful to have had the support and assessment from your establishment this has given me validation and the confidence to know and understand that I process things in a different way giving me a deeper understanding of myself and knowing why I have struggled so much throughout my childhood and adult life. Thank you!”

“We will all be forever grateful to Helen Arkell Dyslexia Charity”

“I can't thank this charity enough, it has helped aid me in where I am today- at university studying paramedic science. Growing up i felt this was completely out of my reach, but this charity has given me the foundations and confidence to become a better version of me. Thank you!”

“This charity has given me the foundations and confidence to become a better version of me. Thank you!”

"Your help has been life changing. I cannot thank you enough. It was the report which got the Local Authority to start paying some attention and start putting some support in place. He is still school avoiding, but it is significantly less, and I do believe without this support, he may not be in school at all. We are very grateful indeed - as a whole family (parents, child, sibling). Many thanks Helen Arkell Dyslexia Charity and everyone who supports you."

"Your help has been life changing."

"The Helen Arkell process was friendly, fast and easy to navigate I'd highly recommend to anyone needing an assessment."

"The assessment has enabled my daughter to understand her strengths and weaknesses enabling her to find ways to manage the challenges she faces."

"This has meant everything to my daughter."

"The assessment has helped my son to understand why he found things difficult. The lady that assessed him convinced him that he has a real superpower in dyslexia and really changed the way he viewed his difficulties. I couldn't recommend enough!"

"Thanks to the assessment, my daughter now knows why she has been struggling so much in school and that it's something she will always have but that she can manage and to a certain extent overcome. Through the charity we have gained advice and tools that will help her for the rest of her life. She now has more confidence and is more willing to try and not let her dyslexia get the better of her."

"The bursary to help me access my appointment with Helen Arkell's dyslexia specialist, and my subsequent diagnosis, has helped me turn my life around."

"This has meant everything to my daughter. The assessment was great and she really enjoyed the process. The diagnosis has meant she can get the support she needs at school. It also helps her confidence as she now knows there is nothing wrong with her, she has an amazing brain, that learns and processes things in a different way. The tutoring has really helped her confidence lessons and she loves the sessions. Thank you so much for everything!"

"Many thanks Helen Arkell Dyslexia Charity and everyone who supports you."

## Our work makes a real difference, a difference to people like Eshani ...



When Eshani's mum noticed that she could tackle complex maths problems but struggled with simpler questions, she knew something wasn't quite adding up. A single parent working part time, she applied for Eshani to have a dyslexia assessment through the Helen Arkell Dyslexia Charity bursary fund. The dyslexia diagnosis confirmed her suspicions and opened the door to transformative support.

Eshani was matched with Lynn, a specialist tutor at Helen Arkell, who introduced learning strategies perfectly suited to her needs. The results have been remarkable helping Eshani develop new ways of thinking about and remembering spellings, while also boosting her problem-solving abilities and her confidence. This transformation was clear in her recent Mock SATs results, which showed a big improvement.

But the impact goes beyond the classroom. During family game nights, Eshani now often outperforms her mum and brother! She is an accomplished swimmer and a member of her local choir. She has also successfully auditioned for a role in an upcoming show in London's West End!

Much of Eshani's motivation comes from her close relationship with her older brother Dhyaan. His example inspires her to push herself in everything she does, creating a positive dynamic that drives both siblings forward.

"I cannot believe how much difference having this tuition has made for Eshani," her mother shares. "The improvement in her work is just outstanding! Lynn has made Eshani think in a different way, and the methods she uses to help Eshani in remembering spellings are just perfect for her."

Students like Eshani are discovering that dyslexia doesn't have to be a barrier to success – it's simply a different way of learning that, with the right support, can lead to remarkable achievements both in and out of the classroom.



## A Helen Arkell bursary can change a life...

"I want to thank you for the help with this bursary; it has enabled me to gain extra support at Uni for my learning."

"Honestly having H assessed and then diagnosed through Helen Arkell has made such a massive difference. I can't thank you enough, without being awarded bursary funding we would not have been able to get H assessed. It has had such a positive impact on H's life now and for in the future too. H now is more willing to ask for support, as she no longer feels she is 'just stupid', she has more self worth. So once again thank you for this amazing service."

"Without being awarded bursary funding we would not have been able to get H assessed."

"The assessment has made a significant difference to our whole family. The fact that we were seen so quickly, the kindness of the assessor towards both my son and myself, and the thorough explanation she provided gave me so much more of an understanding of how to help. Without the bursary towards both the assessment and the tutoring, there is no way we'd have been able to afford it."

"Without the bursary towards both the assessment and the tutoring, there is no way we'd have been able to afford it."

"The Helen Arkell charity was a massive support in getting our son diagnosed with Dyslexia & Dycalculia. Without the help financially he wouldn't have had a diagnosis when he did & potentially would not have got into his specialist SpLD school which has transformed his life. Thankyou so much"

"Things have now been put in to place to help with my sons reading and by understanding it my son does not feel stupid anymore he now knows why he finds it hard to read and understand things. I could not have afforded it by myself. I would hate to think what would have happened if we did not get the funding."

"My son does not feel stupid anymore."

"Without the help of a part funded bursary towards assessment for our child, we wouldn't have been able to afford it. With this assessment we can pinpoint exactly where she needs support and have evidence to support her in exam access arrangements. Thank you."

"Thank you Helen Arkell, the whole process was made easy and I am grateful for all you have done."

## Demand is high right now

We are seeing twice as many applications for bursary-funded support as normal, due to the financial difficulties caused by the cost of living crisis. These include a whole host of children from homes where single-parents or foster-parents are struggling to make ends meet and are frequently in debt, and also a large number of adults who are out of work and see their suspected dyslexia as the single most significant aspect that is holding them back. All of these people are having difficulties.

**We understand that current circumstances are difficult for everyone, but if you are in a position to help with a donation, we would be hugely grateful for your support.**

“I urge you to give whatever you can to this charity. Your donation means so much to families like ours.”

## Treasurer's Report

I am delighted to present my first report as Treasurer of Helen Arkell Dyslexia Charity. My job has been made so much easier because of the exceptional efforts of the outgoing Treasurer, Mike Sicely. I would like to thank Mike for all his tireless work and outstanding contribution to the financial infrastructure of the Charity.

This year the Charity reported a net deficit of (£40,091), compared to a net deficit of (£4,972) in 2023, as reflected in the Statement of Financial Activities (SOFA). The deficit was expected given our increased investment in fundraising and our extended use of historic restricted donations to fund our record level of bursaries in the current year. This deficit therefore masks a strong underlying performance in a year where the Charity increased its reach and impact, as well as income and contribution across each of the core activities of tuition, assessments and courses.

Income from charitable activities (principally the delivery of assessments, tuition and training courses) of £1,383,177 reflected a 17% increase over the prior year (2023: £1,182,508). Income from assessments was up 7%, training up 39% and tuition up 26% which, together with the increase in bursaries granted, underlies the strength of the Charity's work. Continued tight cost control enabled us to contain growth in unrestricted expenditure on charitable activities to 10% (2024: £1,400,550, 2023: £1,277,167) despite this year's increase in charitable activities and the considerable upward pressure from high inflation.

Unrestricted income increased by £90,689 to £1,486,098 (up 6% from £1,395,409) and the unrestricted deficit of (£16,930) compares to an unrestricted surplus in 2023 of £82,167. The Charity continued to utilise historic donations resulting in a deficit on Restricted funds of (£23,161) compared to a 2023 deficit of (£87,139). The generous, restricted donation of £100,00 from Constable Education Trust in 2023 was not fully utilised in that year – the residual £47,086 was utilised, as planned, in 2024.

Unrestricted donations and legacies were lower in 2024: £74,998 versus 2023 £194,568, with 2023 being unusually high in part due to a one-off unrestricted donation from the Arkell family. We achieved an increase of 11% in restricted donations and legacies of £264,963 in 2024 versus £238,031 in 2023, despite the prior year including the final year of the Aegis Trust grant. We continue to make proportionate investments in fundraising activities and are encouraged by initial results in 2025.

At year end unrestricted reserves reflected a decrease of £16,930 to £165,240 (2023: £182,170), remaining within our target range. The Trustees are confident that the Charity has sufficient unrestricted reserves to enable it to execute the business plan and the Board-approved strategy. A break-even budget has been approved by the Board for the 2025 financial year. Restricted reserves stand at £61,505 (2023: £84,666). It is worth noting that cash balances exceed total reserves, another sign of the Charity's good health.

The Charity reports a cash outflow from operations of (£66,157) compared to an outflow of (£63,563) in 2023. At year end overall cash resources were £226,304: a decrease of (£59,148) from 2023.

The Trustees continue to execute the Board-approved investment strategy given the level of cash on hand in the Charity. This is a low risk-based approach primarily focussed on improving the investment return in the form of interest on funds without exposing the Charity to unacceptable levels of risk. Investments are limited to term deposits with approved financial institutions covered by the FSCS deposit protection scheme. No one investment will exceed the £85,000 FSCS protection

limit. Given the increase in interest rates in recent times the Charity will expect an increase in investment income in future periods.

The Trustees remain focussed on maintaining sufficient unrestricted reserves to ensure that the Charity is as financially secure as possible to deal with any further future disruption. All the Charity's reserves are currently held in cash, using a cash management system mentioned above, to maximise interest. The Trustees are very aware that prudent fiscal management is critical in these uncertain times and consequently the Finance, Audit, Investment and Risk Committee (FAIR) continues to meet frequently to oversee the management of the financial affairs of the Charity. FAIR has closely scrutinised the cashflow projections and budgets prepared by management and taken actions as noted in this report where necessary for the financial security of the Charity.

A break-even budget for the forthcoming year has been approved by FAIR and the Trustees. This budget allows for the continued expansion of the Charity, increasing its geographical reach and impact to meet the demand that exists for its services.

### Reserves policy

The Board of Trustees aims for the Charity to maintain sufficient reserves to continue operations in the event of a significant reduction in income for a period of three to six months. The Board is mindful that this does not necessarily require reserves to cover the Charity's total expenditure for such a period. This is because were the Charity to experience a large drop in receipts, given the scalability of its activities, costs would fall in a similar manner. Likewise, the Charity is not entirely reliant on voluntary income to cover all of its costs, as some of its activities generate income.

As a result, the Board believes that the Charity's target level of reserves should be with reference to its 'fixed costs', particularly overheads and the staff costs associated with those who are engaged on full-time, long-term contracts.

Taking the policy into account, the target range for the Charity's reserves associated with its unrestricted activities currently is set by the Trustees at £150,000 to £200,000. The policy and target range are regularly reviewed, reflecting the Charity's size and the proportion of total income achieved by fundraising. This reserving policy was reviewed by the Trustees at the strategy away day in September and no material changes were made to the existing policy.

The Trustees seek to maintain a balance of sufficient reserves whilst also investing in growth to enable more lives to be positively affected by the Charity's work, in accordance with its objectives.

As of 31 August 2024, the balance of Unrestricted Reserves stands at £165,240 (2023: £182,170), successfully meeting the Charity's reserves policy. The Trustees aim to maintain reserves within the target range whilst continuing to grow the Charity's activities. The Trustees will continue to closely monitor the performance of the Charity and market events going forward and will take any necessary actions if business plans or budgets are not met.

### Risk management

FAIR meets regularly to evaluate and monitor the Charity's risk profile. In the year under review the turbulent economy, high inflation and some of the challenges and problems created by the pandemic persisted. The focus of the Trustees continued to be on the financial stability of the Charity and this report outlines the primary actions taken to mitigate the emerging risks. The Charity continues to update the risk register as new risks emerge and to ensure that mitigating actions are taken promptly where necessary.

At the time of this report uncertainty remains about the year ahead, including the potential financial impact of geopolitical uncertainty, increased interest rates and inflation, and the effect of this on the cost of living and, importantly, our own operating costs. FAIR will continue to be responsive in this fast-changing environment. The Charity has a new strategic plan that is dynamic as well as a realistic budget. The Charity is well positioned for the year ahead to pursue its objectives and maintain financial stability.

### Going Concern

The Trustees confirm that, having considered our expectations and intentions for the next twelve months, our track record of delivery, including an approved budget and the availability of working capital, the Charity is a going concern. We confirm that the disclosures in the accounting policies are an accurate reflection of the reasons for our consideration that the financial statements should be drawn up on a going concern basis.

## Plans for the future period

As detailed above (see Strategic Plan, page 17) we have set ourselves bold and ambitious goals for the next three to five years. Building on solid foundations our strategy has at its core a desire to provide an ever broader and deeper offer of support to people with dyslexia and those around them, regardless of ability to pay. Our goal is to increase the reach and impact of our support with a fuller breadth and depth of service. We have set ourselves the following targets for the year ending 31 August 2025:

**Target 1:** In line with our mission to remove barriers to learning, employment and life for people with dyslexia by providing expert, personal and life-changing support, we aim to further increase the numbers of people with dyslexia whom we help with 1:1 support, in the year ending August 2025. This will include 1:1 support by means of assessments, consultations, tuition, skills-building and coaching for children, young people and adults at any stage of their lives.

**Target 2:** We plan to provide significant amounts of bursary-funded specialist support to disadvantaged people with dyslexia from lower-income backgrounds next year, whilst recognising that our ability to maintain current levels of financial support will depend upon our success in achieving sufficient fundraising donations. It is noted that record-breaking levels of bursaries provided in the 22/23 and 23/24 financial years were only possible because of exceptional fundraising donations for this specific purpose.

**Target 3:** We aim to train further cohorts of teachers and teaching assistants specifically from the state school sector, as part of our overall strategy to reach disadvantaged communities. This addresses the fact that learners with dyslexia in state schools generally have less access to teaching staff who have been trained in how to support their needs, than those in the independent school sector.

**Target 4:** We aim to engage with increased numbers of school settings in general, particularly with provision of training in the support of dyslexic learners by means of in-service days, (nine provided in 23/24), and to then follow-up with other support services as applicable to the individual setting.

**Target 5:** We will continue to explore opportunities for strategic partnerships with other organisations whose aims and objectives align with our own, for the ultimate benefit of people with dyslexia across the UK and beyond.

**If any reader of this Annual Report feels inspired to help us progress with any of the above targets, whether financially or otherwise, we would love to hear from you at [enquiries@helenarkell.org.uk](mailto:enquiries@helenarkell.org.uk).**

**Together let's fulfil our purpose of empowering children and adults with dyslexia.**

**HELEN ARKELL DYSLEXIA CHARITY**

**REPORT OF THE TRUSTEES**  
**for the year ended 31 August 2024**

**STATEMENT OF TRUSTEES' RESPONSIBILITIES**

The Trustees (who are also the directors of Helen Arkell Dyslexia Charity for the purposes of company law) are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure of the charitable company for that period. In preparing those financial statements, the Trustees are required to

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- 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 which disclose with reasonable accuracy at any time the financial position of the charitable company and to enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- there is no relevant audit information of which the charitable 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.

**AUDITORS**

The appointment of auditors for the following financial year will be reviewed at the Annual General Meeting.

29 January 2025

Approved by order of the board of Trustees on ..... and signed on its behalf by:

Signed by:

*Michael-John Albert*

.....227230927CB74B4.....

Michael-John Albert  
Chair of Trustees

**REPORT OF THE INDEPENDENT AUDITORS TO THE MEMBERS OF**  
**HELEN ARKELL DYSLEXIA CHARITY**

**Opinion**

We have audited the financial statements of Helen Arkell Dyslexia Charity (the 'charitable company') for the year ended 31st August 2024 which comprise the Statement of Financial Activities, the Balance Sheet, the Cash Flow Statement and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31st August 2024 and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006

**Basis for opinion**

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

**Conclusions relating to going concern**

In auditing the financial statements, we have concluded that the Trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the Trustees with respect to going concern are described in the relevant sections of this report.

**Other information**

The Trustees are responsible for the other information. The other information comprises the information included in the Annual Report, other than the financial statements and our Report of the Independent Auditor thereon.

Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in my report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

**Opinions on other matters prescribed by the Companies Act 2006**

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the Report of the Trustees for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the Report of the Trustees has been prepared in accordance with applicable legal requirements.

**REPORT OF THE INDEPENDENT AUDITOR TO THE MEMBERS OF  
HELEN ARKELL DYSLEXIA CHARITY**

**Matters on which we are required to report by exception**

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the Report of the Trustees.

We have nothing to report in respect of the following matters where the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or certain disclosures of Trustees' remuneration specified by law are not made; or
- We have not received all the information and explanations we require for our audit; or
- the Trustees were not entitled to take advantage of the small companies exemption from the requirement to prepare a Strategic Report or in preparing the Report of the Trustees.

**Responsibilities of trustees**

As explained more fully in the Statement of Trustees' Responsibilities, the Trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

**Our responsibilities for the audit of the financial statements**

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue a Report of the Independent Auditor that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Our approach to identifying and assessing the risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, was as follows:

- the engagement partner ensured that the engagement team collectively had the appropriate competence, capabilities and skills to identify or recognise non-compliance with applicable laws and regulations;
- we identified the laws and regulations applicable to the charitable company through discussions with Trustees and other management, review of the charitable company's 'Register of Legal Requirements', and from our knowledge and experience of the sector;
- we focused on specific laws and regulations which we considered may have a direct material effect on the financial statements or the operations of the company, including the Companies Act 2006, the Charities Act 2011, and legislation relating to employment, environmental issues and health and safety;
- we assessed the extent of compliance with the laws and regulations identified above through making enquiries of management and inspecting relevant correspondence; and
- identified laws and regulations were communicated within the audit team regularly and the team remained alert to instances of non-compliance throughout the audit.

**REPORT OF THE INDEPENDENT AUDITOR TO THE MEMBERS OF**  
**HELEN ARKELL DYSLEXIA CHARITY**

We assessed the susceptibility of the charitable company's financial statements to material misstatement, including obtaining an understanding of how fraud might occur, by:

- making enquiries of management as to where they considered there was susceptibility to fraud, their knowledge of actual, suspected and alleged fraud; and
- considering the internal controls in place to mitigate risks of fraud and non-compliance with laws and regulations.

To address the risk of fraud through management bias and override of controls, we:

- performed analytical procedures to identify any unusual or unexpected relationships;
- tested journal entries to identify unusual transactions;
- assessed whether judgements and assumptions made in determining the accounting estimates were indicative of potential bias; and
- investigated the rationale behind significant or unusual transactions.

In response to the risk of irregularities and non-compliance with laws and regulations, we designed procedures which included, but were not limited to:

- agreeing financial statement disclosures to underlying supporting documentation;
- reading the minutes of meetings of those charged with governance;
- obtaining an overview of the internal procedures adopted by the charitable entity to ensure continued compliance with relevant laws and regulations, including a review of a sample of the reports from internal process audits;
- enquiring of management as to actual and potential litigation and claims; and " reviewing relevant correspondence with relevant regulators.

There are inherent limitations in our audit procedures described above. The more removed that laws and regulations are from financial transactions, the less likely it is that we would become aware of non-compliance. Auditing standards also limit the audit procedures required to identify non-compliance with laws and regulations to enquiry of the directors and other management and the inspection of regulatory and legal correspondence, if any.


Material misstatements that arise due to fraud can be harder to detect than those that arise from error as they may involve deliberate concealment or collusion.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of our Report of the Independent Auditor.

**Use of our report**

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

DocuSigned by:



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Lance Redman (Senior Statutory Auditor)  
for and on behalf of Shaw Gibbs Audit Ltd  
264 Banbury Road  
Oxford  
Oxfordshire  
OX2 7DY

Date: 29 JANUARY 2025

**HELEN ARKELL DYSLEXIA CHARITY**

**STATEMENT OF FINANCIAL ACTIVITIES**  
**for the year ended 31 August 2024**

	Notes	Unrestricted funds	Restricted funds	2024 Total funds	2023 Total funds
		£	£	£	£
<b>INCOME AND ENDOWMENTS FROM</b>					
Donations and legacies	2	74,998	264,963	339,961	432,599
<b>Charitable activities</b>					
Assessments	5	726,419	-	726,419	679,476
Courses		360,591	-	360,591	259,790
Tuition		249,605	-	249,605	198,068
Shop		43,840	-	43,840	41,942
Other		2,722	-	2,722	3,232
		<u>1,383,177</u>	<u>-</u>	<u>1,383,177</u>	<u>1,182,508</u>
Other trading activities	3	10,725	-	10,725	11,807
Investment income	4	<u>17,198</u>	<u>-</u>	<u>17,198</u>	<u>6,526</u>
<b>Total</b>		<b>1,486,098</b>	<b>264,963</b>	<b>1,751,061</b>	<b>1,633,440</b>
<b>EXPENDITURE ON</b>					
Raising funds	6	102,478	-	102,478	85,075
<b>Charitable activities</b>					
Assessments	7	489,211	220,530	709,741	661,517
Courses		202,411	34,755	237,166	212,160
Tuition		230,499	32,839	263,338	226,875
Shop		38,207	-	38,207	39,016
Central staff		207,625	-	207,625	192,583
Shared overheads		232,597	-	232,597	221,186
		<u>1,400,550</u>	<u>288,124</u>	<u>1,688,674</u>	<u>1,553,337</u>
<b>Total</b>		<b>1,503,028</b>	<b>288,124</b>	<b>1,791,152</b>	<b>1,638,412</b>
<b>NET INCOME/(EXPENDITURE)</b>		<b>(16,930)</b>	<b>(23,161)</b>	<b>(40,091)</b>	<b>(4,972)</b>
<b>RECONCILIATION OF FUNDS</b>					
<b>Total funds brought forward</b>		<b>182,170</b>	<b>84,666</b>	<b>266,836</b>	<b>271,808</b>
<b>TOTAL FUNDS CARRIED FORWARD</b>		<b><u>165,240</u></b>	<b><u>61,505</u></b>	<b><u>226,745</u></b>	<b><u>266,836</u></b>

The notes form part of these financial statements

**HELEN ARKELL DYSLEXIA CHARITY**

**BALANCE SHEET**


**31 August 2024**

		Unrestricted funds	Restricted funds	2024 Total funds	2023 Total funds
	Notes	£	£	£	£
<b>FIXED ASSETS</b>					
Intangible assets	13	44,421	-	44,421	50,107
Tangible assets	14	<u>13,096</u>	-	<u>13,096</u>	<u>18,292</u>
		57,517	-	57,517	68,399
<b>CURRENT ASSETS</b>					
Stocks	15	42,319	-	42,319	35,751
Debtors	16	228,122	-	228,122	269,966
Cash at bank and in hand		<u>164,799</u>	<u>61,505</u>	<u>226,304</u>	<u>285,452</u>
		435,240	61,505	496,745	591,169
<b>CREDITORS</b>					
Amounts falling due within one year	17	<u>(327,517)</u>	-	<u>(327,517)</u>	<u>(392,732)</u>
<b>NET CURRENT ASSETS</b>					
		<u>107,723</u>	<u>61,505</u>	<u>169,228</u>	<u>198,437</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>					
		165,240	61,505	226,745	266,836
<b>NET ASSETS/(LIABILITIES)</b>					
		<u>165,240</u>	<u>61,505</u>	<u>226,745</u>	<u>266,836</u>
<b>FUNDS</b>					
Unrestricted funds	19			165,240	182,170
Restricted funds				<u>61,505</u>	<u>84,666</u>
<b>TOTAL FUNDS</b>					
				<u>226,745</u>	<u>266,836</u>

These financial statements have been prepared in accordance with the provisions applicable to charitable companies subject to the small companies regime.

29 January 2025

The financial statements were approved by the Board of Trustees on .....  
and were signed on its behalf by:

Signed by:  
  
 .....227230827CB74BA.....  
 Michael-John Albert  
 Chair of Trustees

The notes form part of these financial statements

**HELEN ARKELL DYSLEXIA CHARITY**

**CASH FLOW STATEMENT**  
**for the year ended 31 August 2024**

		2024	2023
	Notes	£	£
<b>Cash flows from operating activities</b>			
Cash generated from operations	1	(66,157)	(60,979)
Interest paid		<u>-</u>	<u>(2,584)</u>
Net cash provided by operating activities		<u>(66,157)</u>	<u>(63,563)</u>
<b>Cash flows from investing activities</b>			
Purchase of intangible fixed assets		(8,400)	(29,400)
Purchase of tangible fixed assets		(1,789)	(13,836)
Interest received		<u>17,198</u>	<u>6,526</u>
Net cash used in investing activities		<u>7,009</u>	<u>(36,710)</u>
<b>Cash flows from financing activities</b>			
Loan repayments in year		<u>-</u>	<u>(72,067)</u>
Net cash (used in)/provided by financing activities		<u>-</u>	<u>(72,067)</u>
<b>Change in cash and cash equivalents in the reporting period</b>			
		<u>(59,148)</u>	<u>(172,340)</u>
Cash and cash equivalents at the beginning of the reporting period	2	<u>285,452</u>	<u>457,792</u>
Cash and cash equivalents at the end of the reporting period	2	<u>226,304</u>	<u>285,452</u>

The notes form part of these financial statements

**HELEN ARKELL DYSLEXIA CHARITY**

**NOTES TO THE CASH FLOW STATEMENT**  
**for the year ended 31 August 2024**

1. RECONCILIATION OF NET INCOME/(EXPENDITURE) TO NET CASH FLOW FROM OPERATING ACTIVITIES	2024	2023	
	£	£	
<b>Net income/(expenditure) for the reporting period (as per the Statement of Financial Activities)</b>	(40,091)	(4,972)	
<b>Adjustments for:</b>			
Depreciation charges	21,071	17,449	
Interest received	(17,198)	(6,526)	
Interest paid	-	2,584	
(Increase)/decrease in stocks	(6,568)	(5,827)	
(Increase)/decrease in debtors	41,844	(102,307)	
Increase/(decrease) in creditors	<u>(65,215)</u>	<u>38,620</u>	
<b>Net cash provided by operations</b>	<u>(66,157)</u>	<u>(60,979)</u>	
2. ANALYSIS OF CASH AND CASH EQUIVALENTS	2024	2023	
	£	£	
Cash at bank and in hand	133,630	285,452	
Notice deposits (less than 3 months)	92,674	-	
	<u>226,304</u>	<u>285,452</u>	
3. ANALYSIS OF CHANGES IN NET FUNDS			
	At 1.9.23 £	Cash flow £	At 31.8.24 £
<b>Net cash</b>			
Cash at bank and in hand	<u>285,452</u>	<u>(59,148)</u>	<u>226,304</u>
	<u>285,452</u>	<u>(59,148)</u>	<u>226,304</u>
<b>Total</b>	<u>285,452</u>	<u>(59,148)</u>	<u>226,304</u>

The notes form part of these financial statements

## HELEN ARKELL DYSLEXIA CHARITY

### NOTES TO THE FINANCIAL STATEMENTS for the year ended 31 August 2024

#### 1. ACCOUNTING POLICIES

##### **Basis of preparing the financial statements**

The financial statements of the charitable company, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Companies Act 2006. The financial statements have been prepared under the historical cost convention.

##### **Income**

All income is recognised in the Statement of Financial Activities once the Charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Non refundable deposits are recognised when money is received as this is the point the Charity is entitled to it. Course income received in advance is deferred and is recognised evenly over the duration of the service.

The Charity received a significant restricted grant in June 2021, to cover a period of 2 years; this income was recognised over the subsequent 24 month period, spanning the three financial years 20/21, 21/22 and 22/23.

##### **Expenditure**

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the Charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

##### **Intangible asset**

Amortisation is provided at the following annual rates in order to amortise each asset over its estimated useful life. Commencement of amortisation will begin when the asset is available for its intended use.

Website	- 20% on cost
Software	- 20% on cost

##### **Tangible fixed assets**

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Improvements to property	- 25% on cost
Plant and machinery	- 25% on cost
Fixtures and fittings	- 25% on cost

##### **Stocks**

Stocks are valued at the lower of cost and net realisable value, after making due allowance for obsolete and slow moving items.

##### **Taxation**

The Charity is exempt from corporation tax on its charitable activities.

##### **Fund accounting**

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the Trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the Charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. Explanation of the nature and purpose of specific restricted donations is included in the notes to the financial statements.

continued...

**HELEN ARKELL DYSLEXIA CHARITY**

**NOTES TO THE FINANCIAL STATEMENTS - continued**  
**for the year ended 31 August 2024**

**1. ACCOUNTING POLICIES - continued**

**Pension costs and other post-retirement benefits**

The charitable company operates a defined contribution pension scheme. Contributions payable to the charitable company's pension scheme are charged to the Statement of Financial Activities in the period to which they relate.

**2. DONATIONS AND LEGACIES**

	2024	2023
	£	£
Donations	335,885	415,182
Gift aid	4,076	17,417
Legacies	<u>-</u>	<u>-</u>
	<u>339,961</u>	<u>432,599</u>

**3. OTHER TRADING ACTIVITIES**

	2024	2023
	£	£
Fundraising events	<u>10,725</u>	<u>11,807</u>

**4. INVESTMENT INCOME**

	2024	2023
	£	£
Deposit account interest	<u>17,198</u>	<u>6,526</u>

**5. INCOME FROM CHARITABLE ACTIVITIES**

		2024	2023
	<u>Activity</u>	£	£
Income	Assessments	726,419	679,476
Income	Courses	360,591	259,790
Income	Tuition	249,605	198,068
Income	Shop	43,840	41,942
Income	Other	<u>2,722</u>	<u>3,232</u>
		<u>1,383,177</u>	<u>1,182,508</u>

continued...

**HELEN ARKELL DYSLEXIA CHARITY**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
for the year ended 31 August 2024**

**6. COST OF RAISING FUNDS**

**Cost of raising donations and legacies**

	2024	2023
	£	£
Fundraising	<u>102,478</u>	<u>85,075</u>

Fundraising costs include £91,417 (2023 £78,534) relating to the cost of fundraising staff. In the year to August 2023 this included staff funded by the generous support of The Aegis Charitable Trust.

**7. CHARITABLE ACTIVITIES COSTS**

	Direct Costs £	Support costs (see note 8) £	Total £
Assessments	709,741	-	709,741
Courses	237,166	-	237,166
Tuition	263,338	-	263,338
Shop	38,207	-	38,207
Central staff	207,058	567	207,625
Shared overheads	<u>-</u>	<u>232,597</u>	<u>232,597</u>
	<u>1,455,510</u>	<u>233,164</u>	<u>1,688,674</u>

**8. SUPPORT COSTS**

	Management £	Governance* £	Total £
Central staff	567	-	567
Shared overheads	223,297	9,300	232,597
	<u>223,864</u>	<u>9,300</u>	<u>233,164</u>

\*auditors' remuneration

**9. NET INCOME/(EXPENDITURE)**

Net income/(expenditure) is stated after charging/(crediting):

	2024	2023
	£	£
Auditors' remuneration	9,300	8,750
Depreciation - owned assets	6,985	5,969
Software amortisation	12,633	9,350
Website amortisation	1,453	2,130

continued...

**HELEN ARKELL DYSLEXIA CHARITY**

**NOTES TO THE FINANCIAL STATEMENTS - continued**  
**for the year ended 31 August 2024**

**10. TRUSTEES' REMUNERATION AND BENEFITS**

There were no Trustees' remuneration or other benefits for the year ended 31 August 2024 nor for the year ended 31 August 2023.

**Trustees' expenses**

There were no trustees' expenses paid for the year ended 31 August 2024 nor for the year ended 31 August 2023.

**11. STAFF COSTS**

	2024	2023
	£	£
Wages and salaries	911,572	868,025
Social security costs	58,304	67,123
Other pension costs	<u>16,893</u>	<u>16,041</u>
	<u>986,769</u>	<u>951,189</u>

The average monthly number of employees during the year was as follows:

	2024	2023
Charitable Activities	44	44
Fundraising & Communications	4	4
Support Services	<u>3</u>	<u>2</u>
	<u>51</u>	<u>50</u>

One employee received emoluments in excess of £60,000, falling within the range £80,000 - £90,000. The total remuneration for key management personnel in the year was £210,700 (2023: £184,193). 11 employees were full time (2023: 10). 40 employees were part time (2023: 40). No trustees received any remuneration in the year.

**HELEN ARKELL DYSLEXIA CHARITY**

**NOTES TO THE FINANCIAL STATEMENTS - continued**  
**for the year ended 31 August 2024**

12. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES	Unrestricted funds 2023 £	Restricted funds 2023 £	Total funds 2023 £
<b>INCOME AND ENDOWMENTS FROM</b>			
Donations and legacies	194,568	238,031	432,599
<b>Charitable activities</b>			
Assessments	679,476	-	679,476
Courses	259,790	-	259,790
Tuition	198,068	-	198,068
Shop	41,942	-	41,942
Other	3,232	-	3,232
Other trading activities	11,807	-	11,807
Investment income	<u>6,526</u>	<u>-</u>	<u>6,526</u>
<b>Total</b>	<b>1,395,409</b>	<b>238,031</b>	<b>1,633,440</b>
<b>EXPENDITURE ON</b>			
Raising funds	55,075	30,000	85,075
<b>Charitable activities</b>			
Assessments	467,282	194,235	661,517
Courses	158,900	53,260	212,160
Tuition	198,200	28,675	226,875
Shop	39,016	-	39,016
Central staff	192,583	-	192,583
Shared overheads	<u>221,186</u>	<u>-</u>	<u>221,186</u>
<b>Total</b>	<b>1,332,242</b>	<b>306,170</b>	<b>1,638,412</b>
<b>NET INCOME/(EXPENDITURE)</b>	<b>63,167</b>	<b>(68,139)</b>	<b>(4,972)</b>
<b>Transfers between funds</b>	<u>19,000</u>	<u>(19,000)</u>	<u>-</u>
<b>Net movement in funds</b>	<b>82,167</b>	<b>(87,139)</b>	<b>(4,972)</b>
<b>RECONCILIATION OF FUNDS</b>			
Total funds brought forward	<u>100,003</u>	<u>171,805</u>	<u>271,808</u>
<b>TOTAL FUNDS CARRIED FORWARD</b>	<b><u>182,170</u></b>	<b><u>84,666</u></b>	<b><u>266,836</u></b>

continued...

**HELEN ARKELL DYSLEXIA CHARITY**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
for the year ended 31 August 2024**

**13. INTANGIBLE FIXED ASSETS**

	Software £	Website £	Total £
<b>COST</b>			
At 1 September 2023	59,400	62,517	121,917
Additions	<u>8,400</u>	<u>-</u>	<u>8,400</u>
At 31 August 2024	<u>67,800</u>	<u>62,517</u>	<u>130,317</u>
<b>AMORTISATION</b>			
At 1 September 2023	11,850	59,960	71,810
Charge for year	<u>12,633</u>	<u>1,453</u>	<u>14,086</u>
At 31 August 2024	<u>24,483</u>	<u>61,413</u>	<u>85,896</u>
<b>NET BOOK VALUE</b>			
At 31 August 2024	<u>43,317</u>	<u>1,104</u>	<u>44,421</u>
At 31 August 2023	<u>47,550</u>	<u>2,557</u>	<u>50,107</u>

**14. TANGIBLE FIXED ASSETS**

	Improvements to property £	Plant & machinery £	Fixtures & fittings £	Total £
<b>COST</b>				
At 1 September 2023	85,355	109,335	15,161	209,851
Additions	<u>-</u>	<u>1,789</u>	<u>-</u>	<u>1,789</u>
At 31 August 2024	<u>85,355</u>	<u>111,124</u>	<u>15,161</u>	<u>211,640</u>
<b>DEPRECIATION</b>				
At 1 September 2023	85,355	91,043	15,161	191,559
Charge for year	<u>-</u>	<u>6,985</u>	<u>-</u>	<u>6,985</u>
At 31 August 2024	<u>85,355</u>	<u>98,028</u>	<u>15,161</u>	<u>198,544</u>
<b>NET BOOK VALUE</b>				
At 31 August 2024	<u>-</u>	<u>13,096</u>	<u>-</u>	<u>13,096</u>
At 31 August 2023	<u>-</u>	<u>18,292</u>	<u>-</u>	<u>18,292</u>

continued...

**HELEN ARKELL DYSLEXIA CHARITY**

**NOTES TO THE FINANCIAL STATEMENTS - continued**  
**for the year ended 31 August 2024**

<b>15. STOCKS</b>	2024	2023
	£	£
Stocks	<u>42,319</u>	<u>35,751</u>
<b>16. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b>	2024	2023
	£	£
Trade debtors	211,944	259,223
Other debtors	-	1,400
VAT	337	337
Prepayments and accrued income	<u>15,841</u>	<u>9,006</u>
	<u>228,122</u>	<u>269,966</u>
<b>17. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b>	2024	2023
	£	£
Trade creditors	20,997	12,093
Social security and other taxes	18,957	18,096
Accruals and deferred income	266,554	340,447
Accrued expenses	<u>21,009</u>	<u>22,096</u>
	<u>327,517</u>	<u>392,732</u>
<b>18. LEASING AGREEMENTS</b>		
Minimum lease payments under non-cancellable operating leases fall due as follows:	2024	2023
	£	£
Within one year	43,451	41,891
Between one and five years	<u>87,021</u>	<u>116,667</u>
	<u>130,472</u>	<u>158,558</u>

continued...

**HELEN ARKELL DYSLEXIA CHARITY**

**NOTES TO THE FINANCIAL STATEMENTS - continued**  
**for the year ended 31 August 2024**

**19. MOVEMENT IN FUNDS**

	At 1.9.23 £	Net movement in funds £	At 31.8.24 £
<b>Unrestricted funds</b>			
General fund	182,170	(16,930)	165,240
<b>Restricted funds</b>			
Restricted Bursaries	27,580	14,845	42,425
Constable Educational Trust	47,086	(47,086)	-
Linbury Trust	10,000	9,000	19,000
Theo Paphitis/Ryman Ltd	-	80	80
	<u>84,666</u>	<u>(23,161)</u>	<u>61,505</u>
<b>TOTAL FUNDS</b>	<u>266,836</u>	<u>(40,091)</u>	<u>226,745</u>

Net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	1,486,098	(1,503,028)	(16,930)
<b>Restricted funds</b>			
Restricted Bursaries	215,963	(201,118)	14,845
Constable Educational Trust	-	(47,086)	(47,086)
Linbury Trust	19,000	(10,000)	9,000
Theo Paphitis/Ryman Ltd	30,000	(29,920)	80
	<u>264,963</u>	<u>(288,124)</u>	<u>(23,161)</u>
<b>TOTAL FUNDS</b>	<u>1,751,061</u>	<u>(1,791,152)</u>	<u>(40,091)</u>

continued...

**HELEN ARKELL DYSLEXIA CHARITY**

**NOTES TO THE FINANCIAL STATEMENTS - continued**  
**for the year ended 31 August 2024**

**19. MOVEMENT IN FUNDS - continued**

**Comparatives for movement in funds**

	At 1.9.22 £	Net movement in funds £	Transfers between funds* £	At 31.8.23 £
<b>Unrestricted funds</b>				
General fund	100,003	63,167	19,000	182,170
<b>Restricted funds</b>				
Restricted Bursaries	56,730	(19,150)	(10,000)	27,580
Aegis Charitable Trust	1,477	(1,477)	-	-
Constable Education Trust	99,810	(52,725)	-	47,085
FAST Projects	3,787	(3,787)	-	-
Linbury Trust	<u>10,000</u>	<u>9,000</u>	<u>(9,000)</u>	<u>10,000</u>
	<u>171,805</u>	<u>(68,139)</u>	<u>(19,000)</u>	<u>84,666</u>
<b>TOTAL FUNDS</b>	<u>271,808</u>	<u>(4,972)</u>	<u>-</u>	<u>266,836</u>

**\*Transfers between funds**

During the prior year under comparison, £19,000 was transferred from restricted to unrestricted funds. This related to capital expenditure using restricted funds donated to the Charity for two specific purposes (£10,000 for the installation of a fire alarm system at the Charity's head office and £9,000 for implementation of a new software system). As the restrictions were fully satisfied £19,000 was derestricted.

Comparative net movement in funds, included in the above are as follows:

	Incoming resources 2023 £	Resources expended 2023 £	Movement in funds 2023 £
<b>Unrestricted funds</b>			
General fund	1,395,409	(1,332,242)	63,167
<b>Restricted funds</b>			
Restricted Bursaries	131,529	(150,679)	(19,150)
Aegis Charitable Trust	87,502	(88,979)	(1,477)
Constable Education Trust	-	(52,725)	(52,725)
FAST Projects	-	(3,787)	(3,787)
Linbury Trust	<u>19,000</u>	<u>(10,000)</u>	<u>9,000</u>
	<u>238,031</u>	<u>(306,170)</u>	<u>(68,139)</u>
<b>TOTAL FUNDS</b>	<u>1,633,440</u>	<u>(1,638,412)</u>	<u>(4,972)</u>

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## HELEN ARKELL DYSLEXIA CHARITY

### NOTES TO THE FINANCIAL STATEMENTS - continued for the year ended 31 August 2024

#### 20. FUNDS

##### **The Bursary Fund**

The out-going resources represent bursary-funded support granted during the year.

##### **Restricted bursaries**

A number of donors specified that their donations should be used for provision of bursary-funded support to people from lower-income backgrounds, and in some cases these donations carry additional restrictions including factors such as age of beneficiary, county of residence etc. Such donations have either already been spent during the year or are ear-marked to be spent in the subsequent year/s.

##### **The Aegis Charitable Trust**

A restricted donation of £300,000 was received from The Aegis Charitable Trust towards the end of the 20/21 financial year. This was for the purpose of undertaking three projects over the subsequent two years: i) expanding the Charity's fundraising team; ii) providing bursary-funded support to individuals from lower-income backgrounds; iii) providing specialist training to teachers and teaching assistants from State Schools. The income from this donation has been reflected on a time-apportion basis in accordance with the terms of the grant. Consequently £37,500 was recognised within the 20/21 financial year, £175,000 was recognised in the 21/22 financial year and the remaining £87,500 was recognised in the 22/23 financial year. All three projects were successfully concluded in the 22/23 financial year, and the restricted fund is now fully spent.

##### **The Constable Education Trust**

Donations totalling £225,000 were received during the 21/22 financial year from The Constable Education Trust, for the following purposes: i) to provide bursary-funded support to children from lower-income families; ii) to assist in the re-location of the Charity's premises from Frensham to alternative leased premises in Farnham Town Centre, including costs of moving, fit-out, rent and ancillary costs. At the close of the 22/23 financial year, £47,086 remained, which was fully spent in the 23/24 financial year, in accordance with the donor's wishes.

##### **The Linbury Trust**

In 2021 The Linbury Trust commenced a 4-year grant commitment, donating £19,000/year. For the first three years this was partly restricted to the provision of bursary-funded support (£10,000), and partly restricted to the implementation of a new IT system for managing bookings (£9,000). In year 4, the full £19,000 was restricted to the provision of bursary-funded support. The IT system successfully went live within the 21/22 financial year. The funds restricted to bursary-support have been spent during the 12 months following receipt of each annual donation. The fourth and final annual donation was received towards the end of the 23/24 financial year and is allocated to be spent in the 24/25 financial year.

##### **FAST project**

A restricted donation of £3,787 was received towards the end of the 21/22 financial year, for the purpose of delivering a Families and Schools Together project (FAST) in the 22/23 financial year. This project was successfully completed in the 22/23 financial year, and the funds were fully spent.

##### **Theo Paphitis/Ryman Limited**

Restricted donations amounting to £30,000 were received during the year, following the launch of a partnership with Theo Paphitis/Ryman Ltd. It is anticipated that this partnership will continue for 3 years, and it is currently stipulated that funds are restricted to provision of free training to state school teachers and teaching assistants for the improvement of support of learners with dyslexia in the classroom. The commercial participation agreement that is in place allows for different restrictions to potentially apply to future donations. The majority of funds were spent in the year and all were in accordance with the above restrictions. Any funds outstanding at year end are ear marked for expenditure in the following year.

