



# Merton Home Tutoring Service

ANNUAL REPORT AND ACCOUNTS FOR THE YEAR TO 31 JULY  
2022

REGISTERED CHARITY NUMBER: 1139126



## Report from the Chair of Trustees and the Director

The year to 31 July 2022 was a year for unprecedented responses for adapting and increasing our classes and provision to respond to global crises and refugee situations that have devastated people and countries.

With a staggering 264 learners, our numbers increased by 76% from 2020 - 21. Notably, 2020/21 and 2019/20 had already marked a 30% increase and 22% increase respectively. Our largest increase in learners came from Ukrainian refugees in Merton as many have settled with host families in the borough. Through partnership working with Merton Adult Learning and Merton Council's response team for the re-settlement of the refugees from Ukraine we were able to provide additional ESOL English classes. We were very fortunate in recruiting two teachers of English newly arrived from Ukraine to support us with this initiative.

During the year we also introduced ESOL classes with emphasis on skills such as Employability, Digital Skills and Citizenship. These were short course (10-12 weeks duration). Thanks to funding from Merton Council, in November 2021 we were also able to re-commence our Learn English Together project (now called Learn English in Merton) providing a pan-borough assessment and referral service for residents wishing to access ESOL learning. This project has already exceeded the projected number of 250 learners assessed in 12 months, reflecting again the large demand for ESOL provision.

Whilst the Covid Pandemic impacted less than the previous year, it still created a need to adapt our services during times of heightened infection. The restrictions during the covid period impacted our recruitment and training of new tutors to support our Home Tutoring Service. Whilst we have a strong and loyal pool of existing Home Tutors (some whom have adapted to, and are continuing with tutoring online), we are actively recruiting new Home Tutors to fulfil this vital service of tutoring people on a one to one who are unable to access classes due to their home situation, disability, isolation etc.

We had some leadership changes: we welcomed a new Treasurer on board, an Assistant Chair and a new Director, following the resignation of our previous Director. Organisationally we have continued to work hard to ensure strong leadership, systems, and processes- proudly achieving Matrix accreditation in June 2022 - demonstrating high quality information, advice and guidance to our learners.

Our learners achieved strong outcomes and gave positive feedback in their Evaluations, highlighting the value of the learning experience to individuals; not only learning English, but making friends, improving wellbeing, and allowing progression to the next stage of further education or skills training, volunteering, or employment.

Wider endorsement and community recognition of our work was appreciated, when we were a Charity Finalist for Charity of the Year, Merton Best Business Awards in September 2022 and our Morden Conversation Class photo received 2<sup>nd</sup> place in the Merton Heritage Photo competition. We were also proud to present our stories from our learners at Merton Citizen's Refugee Week event 'Healing' – with one of the stories included in our printed Story Collection booklet from our learners.

Our funding partnerships were critical for our sustainability, including our existing multi-year funders such as The National Lottery Community Fund, City Bridge Trust and The Henry Smith Foundation. New trust and foundation funders have more recently come on board to support our increased demand and we became an approved provider of ESOL learning for Merton Adult Learning, securing a three-year contract. However, with the current economic crisis and ongoing refugee crisis, ensuring we can raise enough funds to deliver our vital service, is critical. Our provision is needed more than ever to support some of our most marginalised communities, so they can equip themselves and their families for a positive and progressive future.

We continue to be immensely grateful to the many volunteers who kindly give their time to support us and our learners, in particular the home tutors. We also thank our staff and class teachers who provide the support and encouragement to our learners. Together we are all looking forward to another busy and successful year.

ANNE WORLLEDGE

*Anne Worlledge – Chair*

**23 February 2023**

HEIDI SHRIMPTON

*Heidi Shrimpton - Director*

**23 February 2023**

## OUR CONSTITUTION

Merton Home Tutoring Service (MHTS) was registered as a charity on 7 July 2010 and is governed by a Constitution, as amended on 16 February 2011. We are a registered charity in England and Wales (No: 1139126).

Our objective is to advance the education of adults living in the London Borough of Merton and neighbouring boroughs who do not speak English as their first language and who find it difficult to attend formal classes. To do this, we provide free English language tuition in people's own homes and in community classes.

## OUR VISION

To give learners the opportunity to learn English for everyday use.

To build confidence in the use of English and help to reduce social isolation, and to build independence.

To help learners to understand more about the UK, its systems, cultural customs, and people.

To encourage all learners to move towards greater community integration.

## OUR STRATEGY

**Integration and community cohesion:** Supporting migrant communities and individuals to acquire the linguistic and cultural competences they need to improve their life prospects in the UK. Demonstrating the value that migrants bring to the UK, favouring mutual cultural understanding and cohesion.

**Accessibility and increased learner reach:** Supporting people most in need and least likely to receive support elsewhere. We want to provide a holistic and individualised approach to our learners, strengthening both the quality and reach of our services.

**Resilience and wellbeing:** Empowering individuals and communities to acquire the social and cultural capital they need to face adversity, combat isolation, and thrive in society.

**Excellence:** Developing and supporting our staff and volunteers to deliver the best possible outcomes for learners.

**Partnership and collaboration:** Working proactively with communities and other service providers to bridge gaps in services for the benefit of our learners and the sustainability of their long-term outcomes.

## OUR ACTIVITIES

We are a small, but agile Merton borough wide charity responding to demand for English language tuition, for adult migrants and refugees who are unable to access more formal ESOL classes because of lack of local knowledge, isolation, childcare commitments, disability, poverty or health. We predominantly work with learners who are living in the most deprived wards of Merton or have recently arrived in the UK and are facing a crisis situation.

We aim for learners to reduce social isolation, build confidence and independence, understand more about the UK and its culture, customs and systems and move towards community integration.

We teach learners in their own homes with trained volunteers or in small ESOL English classes taught by qualified teachers. We provide free creche facilities to learners for most of our classes and our creche is managed by qualified childcare workers. Our learner centred provision ranges from entry (E1) to L1, including an exam class accredited by the English-Speaking Board.

Our strong partnership working and community focus, introduces our learners to further progression, volunteering and employment opportunities across the borough enhancing their integration, well-being and personal development.

### **In 2021 – 22 we held the following activities:**

#### **Classes:**

In the year 2021/22 we ran 13 weekly classes in term 1, 14 weekly classes in term 2 and 19 weekly classes in term 3. We provided two online classes for higher level learners, all others were face to face. Our total provision was **469 sessions over the full academic year – in excess of 1,000 hours of class teaching**. All classes were at Vestry Hall in Mitcham except one course for Ukrainian learners at the New Horizon Centre, Pollards Hill, Mitcham, and one conversation group who meet weekly in Morden.

Classes were taught by 10 qualified sessional teachers and supported by 2 volunteers and were attended by 242 unique class learners. Sessions covered levels from E1 to L1 and included one accredited exam class (accredited by English Speaking Board), 4 short digital skills courses for ESOL speakers, 3 employability courses for ESOL speakers (2 at lower level and one at intermediate level), 1 citizenship course for ESOL speakers, 2 courses specifically for Ukrainian learners (one of which split into 3 levels) and 2 conversation groups (Vestry Hall Mitcham and Morden Baptist Church).

#### **Home tutoring**

In the year 2021/22 we worked with a total of 22 unique home learners and 14 volunteer home tutors. We delivered 118 one-to-one sessions in term 1; 69 in term 2; and 40 in term 3, **totalling 227 one-to-one sessions**.

## **HOW WE MEASURE AND REPORT OUR IMPACT, AND HOW WE LISTEN TO THE LEARNER VOICE**

Learning outcomes and progression analysis with teachers and learners.

Confidential feedback from our learners.

Termly learner evaluations, measuring course impact, the changes within their self and move-on destinations.

Creative showcase experiences such as our Story Collection (where 23 learners entered), case studies or at events such as Merton Citizens Refugee Week event.

Independent evaluation and assessment of our service via the Matrix accreditation process, gained in June 2022 and reviewed annually. Matrix independently reviewed our processes and procedures and interviewed two partner organisations, National Lottery Community Fund and Merton Adult Learning, 12 staff and volunteers (including Trustees) and 17 MHTS learners. A copy of the report is available on our website.

Independent evaluation through reporting to our funders, MHTS self-assessment reports for Merton Adult Learning, Trustee Board reporting and general communications such as website/social media.

## OUR IMPACT AT A GLANCE

**Total number of class learners for three terms = 242** (last year was 149 learners).

57 of these learners were Ukrainian.

90% of class learners achieved their outcomes to acquire the language skills required for their level.

Of these, 12 learners gained accreditation in one, two or three skills, from the English Speaking Board.

Of these, 15 learners moved to accredited learning with MHTS or another provider.

Over 20 learners found work or a volunteering position.

85% of learners with progressed within their class from emerging to consolidating or went on to another MHTS class at a higher level.

### Evaluating

**We received 159 Evaluations from classroom learners:**

73% of surveyed class learners reported improved speaking and understanding of English since starting the course.

67% of surveyed class learners are able to talk more easily in their daily life.

77% of surveyed class learners reported feeling more at home in the UK since starting their lessons.

68% of surveyed class learners agreed they meet people socially more often.

73% of surveyed class learners agreed they find it easier to travel on public transport.

79% of surveyed class learners reported the classes improved their wellbeing.

### Home Learners

80% of home learners surveyed reported improved speaking and understanding of English since starting their tutoring.

68% of home learners surveyed in the autumn term are able to talk more easily in their daily life.

76% of surveyed home learners reported feeling more at home in the UK since starting their tutoring.

52% of surveyed home learners agreed they meet people socially more often.

85% of surveyed home learners reported the sessions improved their wellbeing.

In addition to many comments received in our Evaluations, recent learner comments from the independent Matrix Assessment on our charity, individually highlighted the wider change and outcomes of our work:-

*“I feel so much more confident speaking to native Britons.”*

*“I am now able to support my son with his homework.”*

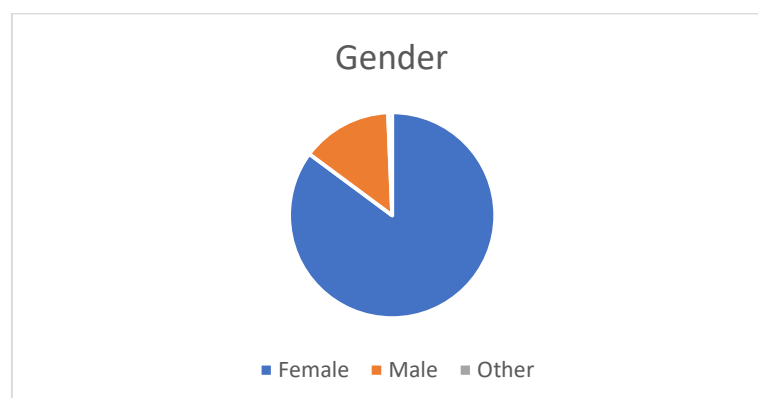
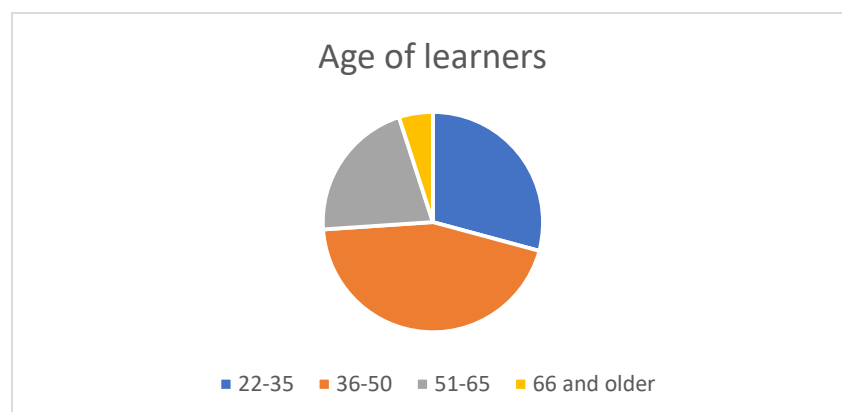
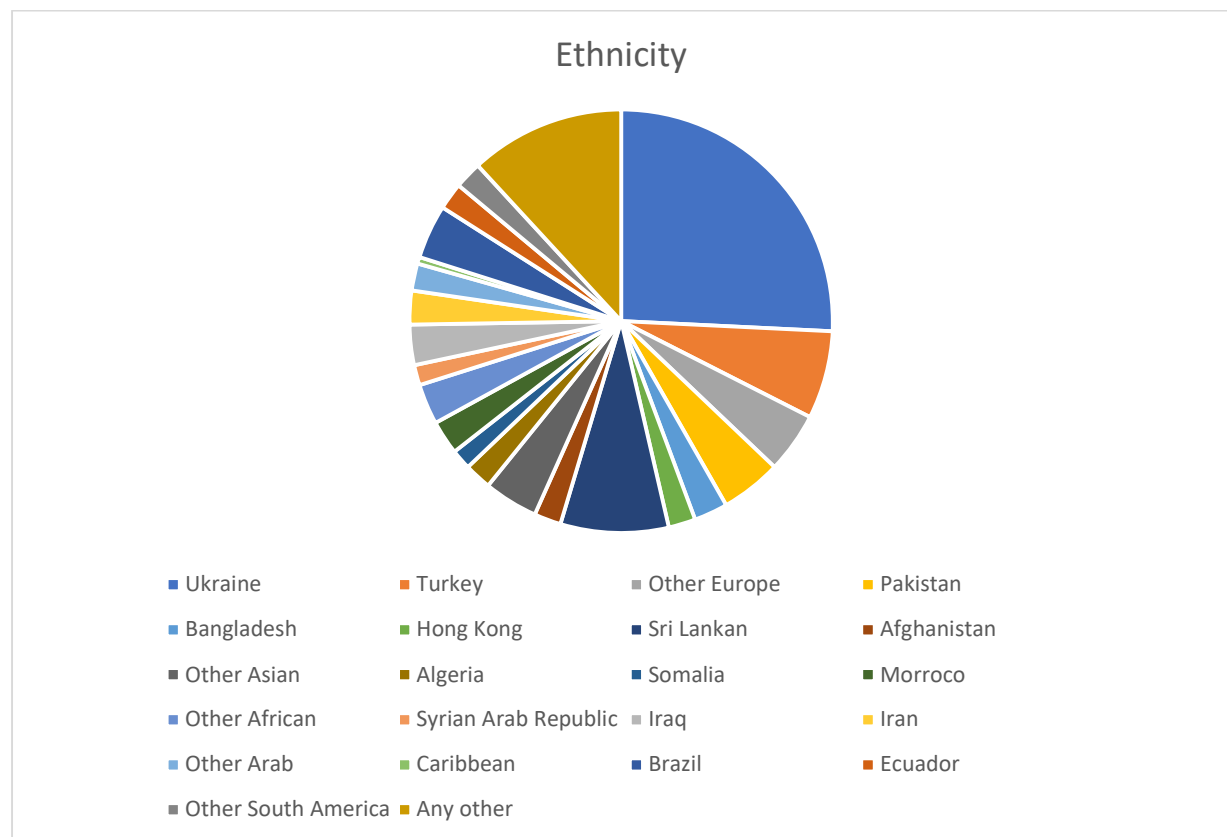
*“I feel more confident about making a doctor appointment, going to hospital appointments and speaking to my child’s teachers at school.”*

*“I feel more confident about explaining myself in an email.”*

Staff, volunteers, partners said:

*“Working here is inspirational and very learner-focused.” “I have volunteered for ten years and feel extremely valued.” Partners describe MHTS service as “very consistent and responsive”.*

## OUR LEARNERS





## HOW WE'VE WORKED WITH THE COMMUNITY

Learners are signposted to us by many different agencies including the Learn English in Merton project, Merton Libraries, Children's Services, refuges, faith groups, refugee networks, Job Centre, Reed in Partnership, Workwise, Educational Services and through networking with other groups such as Merton Citizens and Merton charities who support migrants. Many learners hear about us through word of mouth, posters or referrals.

Our strong partnership working and community focus, introduced our learners to further progression and wellbeing opportunities across the borough to enhance their English learning and integration. For example, we enriched our learners through engagement opportunities with Merton College, Healthwatch, Walk and Talk, Merton Libraries, Merton Uplift and the Merton Citizens Refugee event.

We held a number of community events to celebrate the diversity of our learners and our many different cultures – these included an International Picnic, a Platinum Jubilee celebration and an Eid lunch and a Diwali lunch. More recently some of our learners attended a local Black History Month event.

We are a member of Wimbledon Community Association who promote Merton services and have promoted our services. We also belong to ESOL based networks such as NATECLA (National Association for Teaching English and other Community Languages) and more recently we recruited a volunteer via this network.

As well as supporting our existing Home Tutor volunteers, we continued to engage with new volunteers from the borough, some provided assistance in the classroom as classroom volunteers which enabled more one on one support to learners who were struggling.

### **Volunteer Tutor, Mary said:**

*'I have worked with MHTS for over 5 years. It has been a pleasure to get to know learners, find out their interests and tailor the teaching to their needs. I have discovered diverse views from all around the world - a personally enriching experience.'*

### **Head of Library, Heritage & Adult Education, Anthony Hopkins provided this endorsement for our Charity of the Year application in July '22:**

*"Merton Home Tutoring Service are the integral link drawing all our ESOL provision together for the borough and they link in with the council and all training providers servicing this field. I particularly compliment their work to support our recently arrived Ukrainian residents. They mobilised at short notice, assessment and English classes, helping them integrate into our communities."*

## OUR TRUSTEES, LEADERSHIP AND STAFFING

### **The Board of Trustees:**

Our charity is governed by a Board of 8 Trustees with a range of experience from tertiary education (including higher education), accountancy, law, business and the voluntary sector. We have trustees who are also volunteer tutors and an ex-learner who previously worked in education in her own country.

The Board of Trustees and Officers (the Chair, Secretary and the Treasurer) are appointed by the members at the Annual General Meeting. The Board of Trustees meets formally at least four times a year, with a further Strategy meeting to reflect on the effectiveness of the service and set the operational strategy for the following three years. The trustees give their time voluntarily and receive no benefit from MHTS.

The trustees who served during the year to 31 July 2022 were:

Anne Worlledge (Chair)

Ngozi Nwaejike (Treasurer to February 2022)

Andrew Hight (Treasurer from February 2022)

Mary Moody (Assistant Chair)

Dr Daniela Wilks (Secretary)

Dr Robin Goodchild, Rozina Kader, Cathy Newbury, Pauline Rozario

### **Operational Management:**

The management team comprises:

Heidi Shrimpton – Director

Matthew Ashcroft – Quality and Curriculum Manager

Nicky Dalglish – Project Leader for Learn English in Merton.

The management team are supported by two part-time Office Administrators.

We have a team of 10 sessional teachers and 4 sessional workers for the creche.

***We thank all our staff and volunteers, not forgetting those who left us during the year, for their hard work and dedication to supporting our learners.***

Unit 18, Vestry Hall  
336-338 London Road  
Mitcham  
CR4 3UD  
Website : [www.mhts.org.uk](http://www.mhts.org.uk)

Contact us at: [info@mhts.org.uk](mailto:info@mhts.org.uk)

## FINANCE REPORT

### Finances

During the year to 31 July 2022, and beyond into this new financial year, we have had the continued support of our funders. At the opening of the financial year we had a healthy bank balance at £122,983, including £64,677 of restricted funding available to support our costs in this year, and £58,306 of general reserves.

Our total cost in the year were £195,500 (2021: £121,056). The increase reflects the level of activity for a more ‘normal’ year, in particular staff costs and the cost of teaching rooms, and the cost of providing the creche.

At the close of this year we had financial resources of £127,532, being £51,548 of restricted funds (see table below) and £75,984 of general reserves.

### Restricted funds

	Balance at 1 August 2021 £	Income in the year £	Expenditure £	Transfer to Reserves £	Balance at 31 July 2022 £
Henry Smith Charity	7,437	-	7,437		-
Merton Council	17,984	-	-	(17,984)	-
Viridor	3,937	-	1,372		2,565
Merton Adult Learning	487	18,832	9,863		9,455
Learn English in Merton project	-	36,269	25,102		11,168
City Bridge Trust	9,181	46,000	53,798		1,382
The National Lottery	25,086	92,980	96,089		21,978
Garfield Weston Foundation	565	-	565		-
Thomas Wall Foundation	-	5,000	-		5,000
	<u>64,677</u>	<u>199,081</u>	<u>194,226</u>	<u>(17,984)</u>	<u>51,548</u>

Our principal funder during this financial year was The National Lottery who provided the financial support for our home tutoring service, our classes and our core costs. City Bridge Trust provided funding to support our classes and our core costs and Merton Adult Learning provided funding for classes, specifically the skills based ESOL courses and classes for the Ukrainian learners and separate funding for the first year of the Learn English in Merton Project.

During the year to July 2022 the 3-year finding provided by The Henry Smith Foundation was due to expire. We are delighted that this organisation has renewed its support for the work we do and has granted new funding of £60,000 each year for 3 years, starting in August 2022.

We are also very grateful to the Thomas Wall Foundation for a grant of £5,000 to support our classes and events or activities for our learners.

The National Lottery funded the cost of the Matrix Accreditation and the final costs of the new database developed to allow us to record details of our learners, their progress and the

outcomes achieved. We also completed our project to move all our historic data and office systems to a more efficient system allowing the sharing of management and teaching resources by staff and volunteers. These projects are now completed but we have remaining funding of £6,000 from the National Lottery for the year to 31 July 2023 to allow us to seek external strategic and fundraising support.

We are very grateful to all our funders. They have been a tremendous support to us throughout the year and we hope to continue to have their support in the coming years.

#### *Reserves Policy*

The trustees of MHTS have agreed that we should aim to have general reserves equivalent to 25% of the annual running costs. These reserves are to allow the charity to continue as smoothly as possible when funding is uncertain. General reserves are funds held by a charity that are not restricted for a specific purpose and can be used to meet any of its costs.

At 31 July 2022, a reserves policy of 25% of our expected operating costs for the year to 31 July 2023 would represent general reserves of around £56,000. The reserves at 31 July 2022 were £75,984.

The trustees will continue to review the level of reserves needed in the light of the increased level of activities.

ANDREW HIGHT

**Andrew Hight FCA**

**Hon Treasurer (from 28 February 2022)**

***23 February 2023.***

## Independent Examiners Report

### **Independent examiner's report to the trustees of Merton Home Tutoring Service**

I report to the trustees on my examination of the accounts of the Merton Home Tutoring Service (the Charity) for the period ended 31st July 2022.

### **Responsibilities and basis of report**

As the charity trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

### **Independent examiner's statement**

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

1. accounting records were not kept in respect of the Charity as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

MARK BLACKWELL

Mark Blackwell ACMA  
MHR CONSULTANCY LTD  
Ferneberga House, Alexandra Road  
Farnborough  
GU14 6DQ

2<sup>nd</sup> March 2023

**Receipts and Payments Account for the year ended 31 July 2022**

	Unrestricted Funds £	Restricted funds £	Year to 31 July 2022 £	Year to 31 July 2021 £
<b>RECEIPTS</b>				
Grants received	-	199,081	199,081	68,680
Donations	833	-	833	1,676
Fundraising income	-	-	-	-
Other income	120		120	214
Interest	15	-	15	16
<b>TOTAL INCOME</b>	<b>968</b>	<b>199,081</b>	<b>200,049</b>	<b>70,586</b>
<b>PAYMENTS</b>				
Fundraising costs	-	-	-	-
Staff costs	-	129,014	129,014	95,910
Room rental for classes and creche, and expenses for creche	-	36,149	36,149	5,245
Training of home tutors	-	-	-	400
Books, stationery and teaching aids	-	2,031	2,031	300
Events with learners	673	378	1,052	126
Attendance at conferences and subscriptions to other organisations	-	208	208	200
Website and IT costs	-	3,349	3,349	2,603
Insurance	-	1,610	1,610	833
Telephone and postages	-	390	390	215
Sundry expenses	-	2,549	2,549	1,816
Payroll costs	-	936	936	942
Equipment	-	1,372	1,372	2,806
Independent Examination and AGM	-	877	877	720
Staff training	-	549	549	2,934
Office rental	-	4,932	4,932	2,503
IT support for teaching	-	1,948	1,948	3,503
Cost of Matrix Accreditation	-	2,655	2,655	-
CRM Database Development costs	-	3,540	3,540	-
IT development and migration	-	1,739	1,739	-
Consultancy fees	600	-	600	-
<b>TOTAL PAYMENTS</b>	<b>1,273</b>	<b>194,226</b>	<b>195,500</b>	<b>121,056</b>
<b>NET RECEIPTS IN THE YEAR</b>	<b>(305)</b>	<b>4,855</b>	<b>4,549</b>	<b>(50,469)</b>
<b>Cash funds brought forward</b>	<b>58,305</b>	<b>64,677</b>	<b>122,982</b>	<b>173,452</b>
<b>Transfer of funds</b>	<b>17,984</b>	<b>(17,984)</b>		
<b>Cash funds at the year end</b>	<b>75,984</b>	<b>51,548</b>	<b>127,531</b>	<b>122,983</b>

## Statement of Assets and Liabilities at 31 July 2022

	Unrestricted Funds £	Restricted Funds £	Year to 31 July 2022 £	Year to 31 July 2021 £
Cash balances at HSBC	75,984	51,548	127,532	122,983
Liabilities	-	-	-	-
Net Assets	<u>75,984</u>	<u>51,548</u>	<u>127,532</u>	<u>122,983</u>