



Trustees Annual Report of The Todmorden War Memorial Fund and The Abraham Ormerod Trust

Aims & Objectives

Tod Support is responsible for the two Trusts, and it aims:

To support the sick and needy people in Todmorden in ways appropriate to their needs

“To alleviate pain and suffering and shall be, in the opinion of my Trustees, be of direct benefit to the people of Todmorden”.

Abraham Ormerod will

“To Provide Benefit and Assistance to Veterans of the 1914-1918 or 1939-1945 Wars who are resident in Todmorden, their immediate families, or the needy people of Todmorden.”

Todmorden War Memorial Fund Deeds

Chair's Statement

Welcome, well this has been a year of change, not least the name!

On behalf of the trustees of Tod Support (formerly Todmorden Emergency Support) I present the annual report and accounts for the year ended 31st December 2023 and confirm they comply with the requirements of the Charities Act 2011, the trust deed and the Charities SORP (FRS 102).

Our Trustees are responsible for setting a strategy for achieving the objectives they have set. So, in January 2023, the Trustees agreed to a new structure and introduced a Delivery Group. Rather than meeting to just discuss cases, this would be responsible for the operational delivery of all aspects of the service.

All members of the previous committee were invited to join the Delivery Group. We aimed for diversity and representation across the town.

In February 2023 an Extraordinary Trustee Meeting agreed timeline with final Management Committee taking place in March and the Delivery Group starting in April.

The majority of the appointments to the Delivery Group were agreed by Trustees at the AGM in March and finalized in May 2023, and the group began work implementing the new Framework and acting on some of the recommendations in the audit. A particular raft of work began on the policies which followed the suggested list for small charities by the Charities Commission. This list of our policies is included in Appendix 1. Further work was started to look at how to formally recognize Tod Support with a constitution and ability to apply for grant funding. Further work will be continuing in 2024. We also ventured for the first time in applying for grants to enable aspects of the development work – applications for funds for a website were obtained from Todmorden Town Council and further applications are in hand including applications to Reaps Moss and Calderdale Community Foundation Trust.

May the forthcoming year be an opportunity to continue providing rare and fantastic support to those in Todmorden who are lacking in essentials and without us would be in a far worse position.

Review of Activities & Achievements

Report from the Delivery Group

The role of the new Delivery Group, as agreed by Trustees in the Delegation Framework, is set out below along with progress made from April to December 2023 against each heading.

1. To ensure the service delivered by Tod Support is carried out in an effective and timely manner and within the budget set by Trustees and managed by the Treasurer.

The biggest change in the delivery of the service is the reduction in the time taken to respond to individual cases. Previously, when cases were discussed monthly, there could be a considerable delay before the case was discussed, a decision taken and subsequently actioned. The case worker has the authority to make decisions immediately on requests under £150 and the majority of other cases are now decided on, and actioned, within 4 to 7 days.

There were 2 key pressure points in the year when the monthly budget agreed by Trustees was not sufficient to meet the demand. The first was in August when a large demand for school uniforms meant that a number of other requests for help had to be delayed until the following month. Trustees agreed to increase the monthly budget to £5000 from September and, without that increase, there would have been continual deferring of requests as the final quarter of the year was the busiest ever with 104 cases, just 14 less than the annual total for 2022.

The second pressure point was December. There had been 22 cases by 7th December and £3750 spent. At the coldest time of the year, it was decided to defer white good cases to avoid all the budget being used during the first half of the month. December was the busiest month ever with a total of 46 completed cases, 30 of which included help with fuel. Eight requests for white goods were carried into January.

Case worker Sue Knowles dealt with the increasing demand over this quarter in a calmly efficient manner, with strong support from other members of the team.

Financial record keeping has been improved (details in Treasurer's report)

2 Supporting the decision-making process. Individual members of the Delivery Group will be directly involved in one or more of the Decision-Making Groups supporting each case worker. Collectively the Delivery Group monitors decisions made, encourages the sharing of good practice, and identifies any areas of concern.

Decision making was reviewed in July after 3 months of the new way of working. Delivery Group members congratulated Sue Knowles for the clarity with which she presented information about cases for decisions. Everyone agreed that the first quarter had gone very smoothly, and this has continued to be the case. Issues discussed at monthly meetings have included finding out more about what other organisations do to identifying fraudulent request. Currently one case worker is sufficient, but it is expected that, with the rate of rising demand, a second will be needed. Experienced members of the Delivery Group have taken on the role temporarily when the case worker has been away.

The auditor's report for 2022 recommended the introduction of a decision-making matrix. (Annual Report and Audit page 11, recommendation c) A matrix has now been developed and testing of it began in December 2023 for implementation in 2024.

3 To develop clear processes and procedures for operational delivery, ensure they are implemented and reviewed regularly.

The key document underpinning the decision process is the Guidance for Completing a Case Record. This sets out the criteria for receiving help, the information that Tod Support needs to collect and why that information is needed, the way any interview should be conducted and that everyone should be listed to carefully and treated fairly and with respect. The case record and the Guidance have both been reviewed and amended slightly during the year.

4 To create a marketing plan and ensure it is carried out within the budget set by Trustees.

As part of the marketing campaign, the Delivery Group recommended that the name Todmorden Emergency Support (previously Todmorden Welfare Trust) was changed to Tod Support and this was agreed at the August Trustee meeting, along with a marketing budget,

The website www.todsupport.org.uk was launched on 23rd October 2023 along with the Facebook page. The development of the website is a significant step forward in the transparency of the organisation and its establishment was another key recommendation in the 2022 Audit Report. In addition to providing a way for people to ask for help or other organisations to refer people, it provides information about the history of the organisation, key policies and governance and the annual account and audit.

Along with the website, a Facebook page was created and printed flyers and cards. The publicity has been distributed widely around the town. Since the website was launched there has been a steady increase in self-referrals and in December, self-referrals overtook Food Drop In as the largest source of referrals.

5 Measure impact. The Delivery Group will produce quarterly reports for Trustees on the total number of cases and any significant trends. The information will be used to inform practice and improve the

service.

A summary of all cases is now produced each month with details including where cases are referred from, geographical spread, age of recipients. The summary is discussed at Delivery Group and circulated to Trustees.

Figures are collated quarterly and combined to give the annual totals. It will now be possible to analyse the information to inform, for example, direction of any marketing activity or partnership building. Going forward it will also be possible to analyse trends over different years. It is not possible to make comparisons with previous years as there is little information before 2021.

6 Build partnerships with outside organisations to reach people in need.

Organisations working with people in need are invited regularly to attend the monthly Delivery Group meeting to talk about their work and explore developing closer links with Tod Support.

Organisations attending Delivery Group April to December 2023 were:

Calder Community Cares

Job Centre

Age Concern,

Health Champions and Inspire Health Project,

Voluntary Sector Alliance.

The Delivery Group team now includes people closely involved with other organisations including both food banks, Disability Support Calderdale, and Calder Community Cares so this has also fostered closer working together.

Members of the Delivery Group attended the Town Council's Cost of Living event on the 21st November and distributed lots of publicity to other organisations. Chair of Trustees, Jane Williams, spoke at the event about Tod Support.

In December a very significant development was that Tod Support became an agreed referral partner to the Power Calderdale 4 energy scheme, managed by new ground. In the past clients have been told about new ground but Todmorden Emergency Support could not refer. People who now come to Tod Support for help with fuel can be given access to further support from newground. In the same month Tod Support also became a referral partner for £30 food vouchers available from Calderdale Community Cares.

A new monthly Tod Support drop-in session was set up in November 2023 at Vale Baptist Church to coincide with a planned regular community event. This was cancelled after 2 months due to the lack of support for the community event. The intention is to set up a drop in at the Old Library food bank in Cornholme in the early part of 2024.

7 Training and induction of new volunteers and Case Workers

An induction programme was agreed at the first meeting of the Delivery Group and has been implemented. For example, before a new member of the Delivery Group participates in decision making, the steps are:

Look at Case Record and read and understand Guidance on Completing a Case Record

Accompany case worker on visits.

Attend advice session at Food Drop Ins – Todmorden and Cornholme

June Turner, Secretary Trustees and Delivery Group

Treasurer's Report

During 2023 we have had considerable change at a time when several former treasurers have resigned or retired on ill-health grounds, so it has been necessary to maintain the finances with support from the former treasurer Mary Carrigan and the Town Clerk.

Work on many aspects of the thorough audit included in 2002 report were going to be reviewed by a finance group of the trustees. Some recommendations around policies, recording especially of case records have been put in place. But the review of investment and use of an accountancy package will be taken forward by the newly recruited and appointed treasurer - Jill Bartram.

The previous treasurer Cecily Rogers has been able to manage the investment account until hand over. She also made the first successful application for the grant from the Todmorden Town Council. Cecily wishes to remain on the Delivery Group and continue to contribute to the development work. The treasurer has begun to familiarise herself with the accounts and will start her regular reporting if re-appointed following the AGM in March.

Investments have remained with Black Rock and CCLA and there has been some increase in the interest provided by these accounts. The two charities have different rules with regard to capital withdrawal. Abraham Ormerod's will specifically allow the realisation of capital and this year the trustees felt that in these unusually high cost of living pressures that £30,000 would be withdrawn from the capital in this fund. One pressure point is around the need for support those families who struggle to provide school uniforms for new term in September – ways to deal with this in future years is already in hand. The second-high demand occurred in the run up to Christmas and winter warmth.

Financial record keeping has been improved with a copy of every receipt attached to the case record and provided digitally to the Treasurer. For cash amounts, the money is withdrawn from ATM with both the receipt from the customer and the ATM receipt attached to the case record. All case records are now stored securely at the Town Hall. The spreadsheet created by the Town Clerk is invaluable. The database is checked for each new case and once a decision is made, the Case Worker updates with a range of details and an identification number for each case is assigned automatically.

Mary Carrigan, vice chair- Trustee and Delivery Group

Jill Bartram treasurer – Trustee and Delivery Group

Governance And Management

Risk Management

The Trustees are responsible for the overseeing of the risks faced by the caseworkers and management committee. A formal review of the charity's risk management processes needs to be undertaken in future. The main risks identified are:

- Reputation of the Trust and Todmorden Town Council

We will manage this risk through safeguarding policies and training and effective induction of any new member of the management committee who will be visiting or interviewing the referrals.

- Money. Our ability to continue is reliant on our interest from the capital investments and further grants, decisions to realise capital will be reviewed with this in mind. This risk is managed by seeking advice and guidance on our capital investments.

- Meeting clients. We minimise this risk by ensuring no lone visits/interviews occur and encouraging that at least one of the pair have DBS check and carry a mobile phone. Recommendations this year have been made by the Safeguarding officer to have DBS volunteer checks for any member of trustees or committee who are involved in regularly meeting clients.

Charity Trustees

The charity trustees of Todmorden Emergency Support Trust are appointed by the Todmorden Town Council and serve for 3 years and at least 4 must be appointed or re-appointed at the Council annual meeting as required by the terms of the 1920 Deeds. No more than eight can be serving town councillors. Terms of office is included in Appendix 4.

Current Trustees	Delivery Group from April 1st
Cllr. Jane Williams (Chair)	Cllr. June Turner (Secretary)
Cllr. June Turner (secretary)	Cllr. Mary Carrigan (Interim treasurer)
Cllr. Mary Carrigan (vice chair and interim treasurer 2023) *	Cllr. Andy Hollis
Jill Bartram (treasurer from January 2024)	Cllr. Ken White
Sue Knowles (Case worker)	Cllr. Jane Williams(chair)
Jean Ashworth	Cllr. Steve Martin
Maureen Fielden	Simone Abdul
Cllr. Andy Hollis	Caroline Beardsmore
Julia Wadesworth	Margareta Homstedt
Colin Lyall	Sue Knowles (Case worker)
Cllr. Liz Thorpe	Stuart Jenkins
Kye Abdul	Cecily Rogers

Todmorden War Memorial Fund 1914-1918 Charity Number 219673

A second Trust was set up after World War 2 and the two funds were eventually merged.

To Provide Benefit and Assistance to Veterans of the 1914-1918 or 1939-1945 Wars who are resident in Todmorden, their immediate families, or the needy people of Todmorden.

Abraham Ormerod Charity number 252036

Support for the sick and needy people of Todmorden.

Chairs concluding remarks

I would like to thank all Trustees and members of the Delivery Group for their hard work and unfailing support in moving Tod Support into the 21st Century.

I would like to thank the Case Secretary for her calm and constancy in dealing with a massive rise in cases as we became more well known. And by default, helped more and more people who were living in extremely difficult circumstances.

I would like also to thank our secretary for her unremitting work at getting us to where we are!

Finally, I would like to thank the Todmorden Town Council Clerk for her knowledge, guidance and support over the last difficult, if good year.

Jane Williams – Chair, Trustee, assistant case worker and Delivery Group

Appendix 1

Policies

To view any policy please use this link to Tod Support <https://todsupport.org.uk/what-we-do/governance/>

Name	Date of Approval	Review Date
Code Of Conduct	Sept 2023	March 2025
Safeguarding	Sept 2023	March 2025
Health And Safety	Sept 2023	March 2025
GDPR	Sept 2023	March 2025
Complaints	Sept 2023	March 2025
Data Protection and Privacy	Sept 2023	March 2025
Disclosure And Barring	Sept 2023	March 2025
Governance	Sept 2023	March 2025
Grievance	March 2024	March 2026
Risk Assessment		
Risk Management		
Whistle Blowing		
Equality And Diversity		
Document Retention	Sept 2023	March 2025
Applicant/Client Privacy Policy		

The Annual report will be published on Tod Support website and on the Todmorden Town Council website. The financial appendix will be posted on the Todmorden Town Council noticeboard outside the Town Hall.

Appendix 2 Casework Expenditure

Trend in requests for help

Annual totals

2021	2022	2023
23	118	245

In 2022 Todmorden Emergency Support had little public profile and no direct connections with people in need. The big increase in cases in 2022 was driven by the establishment of a monthly advice session at the Food Drop In and on-going referrals from the food bank.

Quarterly figures 2023

Jan-March	April-June	July-Sept	Oct-December
25	40	76	104

The rapid increase each quarter in the number of cases demonstrates clearly the success of the new Delivery Group, which began in April 2023.

2. Referred by

	2022	2023
Age Concern	0	1
Calder Community Cares	0	34
Disability Support Calderdale	0	7
Food Drop In	30	37
FD1 TS advice session	31	58
Job Centre	22	43
Other	16	9
Religious organisations	0	1
Self-referrals	7	50
Social Services	1	1
Trustees/members	11	2
Vale Baptist Church	0	2
Total	118	245

The increase in the range of organisational referrals reflects both the partnership building and the marketing carried out by the Delivery Group. A significant new partner is Calder Community Cares and a member of CCC is now on the Delivery Group, which has been very beneficial to both organisations. There has been a big increase in self-referrals and this trend is expected to continue now that people can ask for help via the website, by phone or email.

3. Profile of 2023 cases

Age profile

18-25	25- 40	40-60	60-80	80+
27	142	55	18	3

Geographical spread by ward

Ward	No of cases	Ward	No of cases
Central	64	Stansfield	30

Cornholme	72	Stoodley	48
Langfield	7	Walsden	22

There were also 2 people helped who were of no fixed abode.

Help provided

3 out of the total of 245 requests were refused.

Item	Number	Item	Number
Bed/bedding	9	Other	9
Clothing/shoes	7	School Uniforms	29
Food	113	Soft furnishings	8
Fuel	119	Travel	14
Furniture	5	White goods	36

Note Number of items provided is higher than the number of cases as many needed more than one item e.g., help with both food and fuel or school uniform and a bed.

Appendix 3 Annual Accounts – December 2023

Financial Summary 2023			
	Abraham Ormerod	War Memorial	totals
Opening Bank Balance (01/01/2023)	£12,000.00	£13,073.44	£25,073.44
Cash	£175.81	£0.00	£175.81
Income			
Black Rock	£1,318.08	£957.88	£2,275.96
CCLA	£29,581.74	£4,843.84	£34,425.58
Interest	£252.65	£252.65	£505.30
Cash Back	£24.89	£24.89	£49.78
Grants Received	£252.75	£252.75	£505.50
<i>Total Income</i>	<i>£31,430.11</i>	<i>£6,332.01</i>	<i>£37,762.12</i>
Expenditure			
Insurance	£295.67	£291.23	£586.90
Room Hire	£70.00	£70.00	£140.00
Cases	£22,821.03	£15,600.92	£38,421.95
Grants given (linked)	£10,000.00	£0.00	£10,000.00
Administration	£122.50	£122.50	£245.00
Miscellaneous	£369.22	£217.43	£586.65
<i>Total Expenditure</i>	<i>£33,678.42</i>	<i>£16,302.08</i>	<i>£49,980.50</i>
Accounts Balance	£9,927.50	£3,103.37	£13,030.87
Closing Bank Balance (31/12/2023)	£9,927.50	£3,097.02	£13,024.52
<i>Variance</i>	<i>£0.00</i>	<i>-£6.35</i>	<i>-£6.35</i>

Not audited March 1st, 2024

INVESTMENT CAPITAL

TODMORDEN WAR MEMORIAL FUND

	2020	2021	2022	2023
BLACK ROCK	£31,449.00	£29,327.00	£25,682.78	£23,681.82
CCLA	£157,416.00	£172,416.00	£171,603.18	£174,039.86
COIF	£1,535.00	£1,535.00	£1,535.00	£1,535.00
TOTAL	£190,400.00	£203,278.00	£198,820.96	£199,256.68

ABRAHAM ORMEROD TRUST

	2020	2021	2022	2023
BLACK ROCK	£43,355.00	£40,335.00	£35,000.00	£25,674.14
CCLA	£152,226.00	£166,489.00	£156,047.83	£141,540.92
COIF	£100	£100	£100	£100
TOTAL	£195,681.00	£206,924.00	£191,147.83	£167,315.06

COMBINED TOTAL	£386,081.00	£410,202.00	£389,968.79	£366,571.74
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Final calculations on the return on the investments will be completed once the last quarter figures are finalised. (Usually March/April)

- The total value of our investments was £366,571.74 which was an decrease of £23,397.05 on the previous year due to the change in rates. This is returning us to the 2020 amounts even though we have withdrawn some of the capital.
- The yield from Black Rock is about 0.31% higher than that from CCLA.
- The balance in our Virgin Bank account as of 31st December 2023 was £13,024.52

RETURN ON INVESTMENT

Accounts produced on behalf of Trustees of Todmorden War Memorial Trust and Abraham Ormerod Trust by Cllr. Mary Carrigan and approved by Jill Bartram (Treasurer) also acknowledging the work of Cecily Rogers during 2023.

An independent review will be carried out, a review of progress on action points arising from the last audit and the audit report will be included with the final version of the annual report which will be submitted to Todmorden Town Council. Approval of draft accounts will be available following Trustees meeting in March and submission to Todmorden Town Council on 13th March.

Accounts and annual report will be submitted to the charities commission before the required submission date in October.