Trustees Annual Report of The Todmorden War Memorial Fund and The Abraham Ormerod Trust 2024

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

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 Statement

Welcome, this year has been one of consolidation!
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 2024 and confirm they comply with the requirements of the Charities Act 2011, the trust deed, and the Charities SORP (FRS 102).
We welcomed a new Treasurer toward the beginning of the year who has implemented systems to facilitate the work she has to do and allows for greater transparency in our financial dealings. Additionally. she has flagged up work that the Trustees need to do to ensure greater control of our spending.
We adopted a new constitution that allows Tod Support to become a separate Charitable Incorporated Organisation (CIO) and we have now applied to the Charity Commission to be a CIO.
An induction programme was agreed for new trustees.
We successfully applied for funding for the School Uniforms project.
Toward the end of 2023 we became a partner of New Ground who are the facilities company for Together Housing and were able to access Energy Vouchers for our clients. During 2024 we made 46 successful applications totalling £16350, we hope to continue with this partnership in 2025.
The majority of Trustees have now been working together for twelve months or more and this has massively helped the smooth running and decision making of the organisation.
We have been guided and supported by Naomi the Todmorden Town Clerk and thank her for her continued support.
At the end of this year, we will see the resignation of our brilliant and hard working secretary June, and she will be sorely missed. I would like to thank her for both the work she has done as a secretary but also and equally important for her drive in getting us to where we are now.
This year we have helped a huge number of people who otherwise would be in a really impossible position.
Next year will see us increasing our applications for external funds, hopefully approval for Tod Support as a new charity and continuation of the work we do for people in Todmorden.

Report from the Delivery Group

The role of the Delivery Group, as agreed by Trustees in the Delegation Framework, is set out below along with progress made during 2024 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 Delivery Group was set up in April 2023 so 2024 was the first full year of its operation. It has continued to run smoothly, on the whole, and the majority of cases are dealt with in 4 to 7 days.

Budget
The decision of Trustees at the February Trustee meeting to reduce the monthly budget of the Delivery Group from £5,000 to £3000 caused considerable difficulties for the Delivery Group during March to June. It was not possible to meet all requests in a timely manner with a number of requests, particularly white goods, held over to the following month. There was inevitably a reduction in the amount of support provided for food and fuel and people have been turned away. Sue Knowles, the Case Worker, spoke eloquently at the June Trustee meeting of the pressure she had been under managing a reduced budget and high demand.
The reintroduction of a budget of £5000 at the June Trustee meeting ensured a much smoother quarter with more people helped in a timely manner. July was the busiest month ever with a total of 64 cases, 33 of which were school uniforms. The previous highest number was December 2023 when there were 46 cases. School uniforms were funded separately with a grant from Community Foundation For Calderdale and additional funding agreed by Trustees.

July and August were both busy months and it was clear that families were struggling during school holidays without access to breakfast club, school lunches and other support. There was a big demand for help with food and fuel and travel for holiday activities. 16 cases were carried over into August and 2 into September. The final month of the quarter was much steadier.
At the November Trustee meeting, Trustees agreed the Treasurer's recommendation that a budget should be set for the Delivery Group over an 18-month period from January 2025 to March 2026 with amount of £5,000 or £3,500 depending on the time of year. This was welcomed by the Delivery Group as it provides certainty.

Case worker

Sue Knowles has been the Case Worker since the new structure of the Delivery Group was set up in April 2023. It is thanks to Sue that the response to people who need help has gone so smoothly. Sue listens to people who need help carefully, and treats everyone fairly and with respect. She has role modelled appropriate behaviour as there is always another member of the Delivery Group who accompanies Sue on house visits. She is also very organised and efficient, ensuring that all appropriate records are kept and that the monthly budget is not exceeded. There are other experienced members of the Delivery Group who can take over from Sue when needed but a priority for 2025 should be recruiting a second case worker so that the considerable case work can be shared.

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.

The auditor's report for 2022 recommended the introduction of a decision-making matrix. (Annual Report and Audit page 11, recommendation c) A matrix was developed in 2023 and tested during December and implemented during 2024 The decision-making matrix was a useful tool to help decide who would be priority cases, when demand outstripped the budget.

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

The key document under pinning 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 during the year
The Treasurer presented to the July meeting guidelines for financial transactions which anyone involved in casework is following

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

Since the launch of the website and publicity in October 2023, the focus of marketing has been on working with partners and ensuring publicity continues to be distributed.
Tod Support was included in the VSI Directory and also the Calderdale Cost of Living and Tackling Poverty newsletter.

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
Number of cases by year.

2021	2022	2023	2024
23	118	245	402

The upward trend in the increase in cases has continued. The sharp increase in 2022 was because of the partnership with the Food Drop In. The Delivery Group was set up in April 2023 and website and publicity were launched in October 2023.

Annual statistics 2024

5.1. Referrals

The biggest change is the large increase in self-referrals via website, email, or telephone. This is directly related to the launch of the website and publicity in October 2023. Partners can now give people Tod Support publicity and encourage direct contact.

Year	Number of self-referrals	Total number of cases	Percentage
2024	233	402	59%
2023	50	245	20%
2022	7	188	4%

5.2 Age group and household make up

26 to 40 age group continues to be the largest group followed by 41 to 60 and 18-25. Statistics were also collated for the first time in 2023 on the type of household. The largest group by far was single parent families followed by single people

Household Make up 2024	
single person	137
couple	5
single parent family	188
family	57
single pensioner	14
pensioner couple	3
other	0

5.3 Geographical spread of cases

The data shows that Tod Support is continuing to reach people across all wards in Todmorden. Most wards show considerable increase from 2023, as would be expected with the large increase in the overall number of cases. This is not the case for Stoodley, which decreased from 48 in 2023 to 31 in 2024, or Cornholme, which increased slightly from 72 to 77. This needs to be addressed in the marketing plan for 2025.

For the first time in 2024, data about the number of homeless people helped was collected and this was 19.

5.4 Health

A key statistic collected in 2024, but not previously, was the number of cases where long term illness was a factor. In 2024 this was 81% of households, 295 out of 365. Health statistics were not collected for the families needing school unforms and this needs to be done in 2025.

Full casework statistics are shown in **Appendix V**

6. Building partnerships

Tod Support continues to be a partner to Calder Community Cares £30 food voucher scheme and the case worker is regularly referring people for this additional support.

Tod Support is also a partner with Newground and the Power Calderdale scheme, with Jane Williams managing the referrals. Majority of people referred received £196, spread over 4 payments.

A second drop in session began at the Old Library food bank in March 2024 and ran for a short period of time but was discontinued because the numbers there are small. People are now much more aware of Tod Support and, crucially, there is always someone there from Delivery Group who is also an Old Library volunteer so requests are still being picked up.

The practice began in 2023 of inviting guest speakers from other organisations to attend the Delivery Group. This has continued and is an excellent way of finding out more about each other and how we can work together**.**

Programme of guest speakers at Delivery Group meeting in 2024

January	Age Concern
March	Disability Support Calderdale
May	Lionesses
June	Rev Shelley and role in the community
August	Calderdale Libraries
September	Tod Kindness Crew

7. Training and induction of new volunteers and Case Workers

New Trustees appointed during the year have attended a Delivery Group meeting and observed the Tod Support drop-in-session at the food bank.

Some members of the Delivery Group attended in May a Calderdale Council Anti-Poverty event held in Todmorden Town Hall about the effect of poverty on children and young people. Contact was made with other organisations and publicity distributed.

At the July meeting members watched the film produced by Calderdale Council for the Anti-Poverty event in May. The film highlighted the impact of poverty through the voices of children and young people.

At the November meeting Jane Williams, safeguarding officer, reminded the team of key points of the Tod Support safeguarding policy.

8. Any other activity as directed by Trustees

None requested.

Treasurer's Report

Major changes in 2024 were the closure of the Black Rock investment accounts and the transfer of the funds to the CCLA investment accounts. (The CCLA Charity Investment Fund is a common investment fund governed by the Charities Act 2011, and authorised by the Charities Commission). The CCLA accounts were also merged, reducing the number of accounts from 5 to 2. There is now one account for the War Memorial funds and one account for the Abraham Ormerod funds. This has simplified financial reporting.

An additional bank account called Tod Support has been opened with Virgin Money to be used for income nd expenditure of grant funds. There is currently a zero balance.

All transactions for case work and income from investments are currently carried out in the Todmorden War Memorial Virgin Bank Account.

During 2024 there has been a considerable increase in withdrawals of capital from the Abraham Ormerod Trust fund, to meet the demand from applicants for our help, due to pressures on household expenditure from increased fuel bills and inflationary price rises which has resulted in considerable hardship in the town. As a result, an extra meeting of Trustees was organised in November to agree the amount of expenditure for case work during 2025. A programme of expenditure was agreed for each month which was incorporated into the budget for 2025. The Todmorden War Memorial Fund currently holds reserves of £202,207, and the Abraham Ormerod Fund currently holds reserves of £121,380. The total reduction in capital reserves is £42,944 for the year of 2024.

For the first time a budget was produced for the following year, 2025, to enable better planning of withdrawals of capital and expenditure on case work. (See Appendix IV).

The audit for 2024 recommended that a financial strategy be produced, this was presented to the Trustees, and approval was given.

The audit also recommended that insurance cover should include amounts of cash carried by the caseworker, this was implemented, resulting in a small increase in the cost of insurance.

A simple purchasing procedure was produced to aid present and future case workers in the purchase of items for cases and to ensure that there is consistency.

A meeting was held with a representative of the NHS Calderdale and Huddersfield Foundation Trust to enquire about the application for funds for Tod Support. (This fund was set up from income from the Abraham Ormerod Trust). However, no progress has been made in this matter despite considerable efforts from Trustees.

The Treasurer has reviewed the recommendation of the Auditor to purchase an accounting system for Tod Support, however, decided that this is not needed and would be an unnecessary expense.

Tod Support was successful in its application for a grant from the Community Foundation for Calderdale to contribute to the costs of the purchase of school uniforms in July 2024.

The Annual Accounts show a closing balance of £20,114, with a variance of minus £39.57 (See Appendix II).

Governance And Management

Trustees recognise that a priority for 2025 must be the introduction of a Risk Assessment and Risk Management policy.

The Trustees are responsible for the overseeing of the risks faced by the caseworkers and management committee.
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 Delivery Group who will be visiting or interviewing clients.

- Money. Our ability to continue is reliant on our interest from the capital investments and further grants. Decisions to realise capital will be reviewed throughout the year with this in mind.
- Meeting clients. We minimise this risk by ensuring no lone visits/interviews occur and ensuring that at least one of the pair have a DBS check and carry a mobile phone.

Charity Trustees

The charity trustees of Tod 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.

Current Trustees	Delivery Group from April 1s 2024
Cllr. Jane Williams (Chair)	Simone Abdul (Chair)
Cllr. June Turner (secretary)	Cllr. June Turner (Secretary)
Cllr. Mary Carrigan (vice chair and interim treasurer 2023) *	Jill Bartram
Jill Bartram (Treasurer from January 2024)	Laura Nelson (Minute Taker)
Sue Knowles (Case worker)	Cllr. Mary Carrigan
Cllr. Andy Hollis	Cllr. Andy Hollis
Julia Wadesworth	Cllr. Ken White
Colin Lyall	Cllr. Jane Willams
Cllr. Liz Thorpe	Cllr. Steve Martin
Qayum Abdul	Caroline Beardsmore
Gina Choy	Margareta Holmstedt
Patricia Taylor	Sue Knowles (Case worker)
	Stuart Jenkins
	Cecily Rogers

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.

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

APPENDIX I

Policies

You can see a number of policies by using 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
Financial Control Policy	November 2024	November 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 II
Annual Accounts

Opening Bank Balance (01/01/2024)		£13,024.52
Cash		£0.00
Income		
Abraham Ormerod	Black Rock	£728.94
Abraham Ormerod	CCLA	£3,876.63
War Memorial	Black Rock	£978.03
War Memorial	CCLA	£5,051.87
Bank	Interest	£220.01
Cash Back	Cash Back	£77.22
Capital Withdrawal	CCLA	£54,480.00
Capital Withdrawal	Blackrock	£0.00
	Grants Received	£2,060.00
	AO Income	£425.65
	Total Income	£67,898.35
Expenditure		
	Grants given	£260.00
	Administration/ Misc	£1,258.98
Abraham Ormerod	Cases	£49,164.73
War Memorial	Cases	£10,154.47
	Total Expenditure	£60,838.18
Accounts Balance		£19,824.69
Closing Bank Balance (31/12/2024)		£20,114.00
Variance		-£39.57

APPENDIX III
INVESTMENT CAPITAL

TODMORDEN WAR MEMORIAL FUND

	2020	**2021**	**2022**	**2023**	**2024**
BLACK ROCK	£31,449.00	£29,327.00	£25,682.78	23681.82	
CCLA	£157,416.00	£172,416.00	£171,603.18	174,039.86	202,207
COIF	£1,535.00	£1535.00	£1535.00	1535.00	
TOTAL	£190,400.00	£203,278.00	£128,820.96	**199,256.68**	**202,207**

ABRAHAM ORMEROD TRUST

	2020	**2021**	**2022**	**2023**	**2024**
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	121,380
COIF	100	100	100	100	
TOTAL	195,681.00	206,924.00	180,739.26	**167,315.06**	**121380**

COMBINED TOTAL	**386,081.00**	**410,202.00**	**309,560.22**	**366,571.74**	**323,587**

APPENDIX IV

Budget for Tod Support 2025

Todsupport War Memorial Bank account													
Bank Balance 31/12/2024	20,119.67												
Budget 2025	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec	TOTAL
INCOME													
CCLA capital interest Todmorden War Memorial		1,399.00			1,399.00			1,399.00			1,399.00		5,596.00
CCLA capital interest Abraham Ormerod		900.00			900.00			900.00			900.00		3,600.00
Grant Income						3,000.00							3,000.00
Bank Interest	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	96.00
TOTAL	8.00	2,307.00	8.00	8.00	2,307.00	3,008.00	8.00	2,307.00	8.00	8.00	2,307.00	8.00	12,292.00
EXPENDITURE													
Case Work	5,000.00	5,000.00	5,000.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	3,500.00	5,000.00	5,000.00	49,500.00
Insurance TWM					347.00								347.00
Insurance AO					343.00								343.00
Mobile Phone Sims	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	60.00
Website Annual Fee						143.00							143.00
Web Site Domain Name Fee									20.00				20.00
Delivery Group Room Hire				240.00									240.00
Trustee Group Room Hire				120.00									120.00
Data Protection Fee											35.00		35.00
School Uniforms						5,000.00							
TOTAL	5,005.00	5,005.00	5,005.00	3,865.00	4,195.00	8,648.00	3,505.00	3,505.00	3,525.00	3,505.00	5,040.00	5,005.00	50,808.00
Capital Withdrawal from Abraham Ormerod Trust			8,193.00			8,193.00			9,693.00			12,937.00	39,016.00
Income - Expenditure	- 38,516.00												
Capital Withdrawal 2025	39,016.00												
Bank Balance end Dec 2025	20,619.67												

Approval of draft accounts will be available following Trustees meeting in April and submission to the next available Todmorden Town Council.
Accounts and annual report will be submitted to the charities commission before the required submission date in October.

APPENDIX V: Tod Support Annual Case Statistics 2024

Total Referrals	406	Total Supported	402

Referrals from:			
Calderdale Council	1	Other	20
Calder Community Cares	9	Religious organisation	1
Disability Support	8	School	1
Food Drop In	39	Scouts	0
Food Drop In (TES)	36	Self-referral	233
Healthy Minds	0	Social Services	3
Job Centre	31	TS Trustee	9
CAB	1	Todmorden Town Council	0
Cornholme old library	5	Child Centre	5
		Total	402

Age Groups:	
18 > 25	48
26 > 40	220
41 > 60	111
61 > 80	23
80+	2

Health issue: *	
Yes	295
No	70

*health information not collected for 33 school uniform cases

Ward referrals from:	
Central	133
Cornholme	77
Langfield	17
Stansfield	71
Stoodley	31
Walsden	47
Refugee	0
Homeless	19

Funds provided for:			
Bed/bedding	19	School Uniform	33
Clothing/shoes	28	Soft Furnishing	15
Food	179	Travel	49
Fuel	149	White Goods	52
Small appliances	20		

note: people may have more than one item

Household Make up:	
single person	137
couple	5
single parent family	188
family	57
single pensioner	14
pensioner couple	3
other	0

Expenditure on cases by category

Bedding	£5,140.74
Clothing/shoes	£1,979.94
Food	£14,829.00
Fuel	£2,790.00
Furniture	£620.00
Other	£3,230.94
Small Appliances	£2,049.12
Soft Furnishings	£4,235.00
Travel	£970.00
White Goods	£17,424.46
School Uniforms	£5,150.00
Total	**£58,419.20**