

SAMARITANS

Tamworth

Annual Review 2023-2024



Introduction

Background

This report has been written in the summer of 2024 as report on progress since our last AGM in December 2023, in preparation for our AGM in October 2024. It also serves to present on our position to the 31st March 2024 in terms of our financial position and progress as our Annual Report.

About Tamworth Samaritans

The Samaritans provides confidential emotional support through a listening service 24 hours a day by telephone, email and online chat through a network of over 200 branches in the UK and Republic of Ireland and also in a range of outreach settings. The vision of Samaritans is that fewer people will die by suicide each year and the service is for anyone who feels they need support and someone to talk to, whatever they are facing.

Tamworth Samaritans is one such branch providing this service, as an independent charity and affiliate branch of central Samaritans. Tamworth Samaritans volunteers respond to callers via email and telephone and deliver outreach and awareness events and activities.

As at 31st March 2024, Tamworth Samaritans consisted of 96 volunteers and currently is governed by a team of six Trustees. Two of the Trustees are Branch Co-Directors elected to run the branch in the autumn of 2023, with a three year term beginning on 1st December 2023. The Trustees are supported by a wider team of Deputy Directors (DDs) selected by the Co-Directors who have responsibility for different areas of the branch's operations (mentoring, shift leaders, rota, training, recruitment, volunteer care, outreach). Individual volunteers also take responsibility for specific tasks to support the running of the charity, including IT support, health and safety, first aid, purchasing, DBS checking, etc.

The whole Branch Leadership Team meets on a monthly basis, with additional Trustee meetings taking place every other month. Trustees and DDs lead separate team meetings as required.

In the year 1st April 2023 – 31st March 2024, Tamworth Samaritans supported 9,909 callers and responded to 904 emails, totalling 10,813 callers in need.



Administrative details

Directorship

The Branch Co-Directors are Megan Hubbard and Shannen Woodcock (term start date 01/12/23).

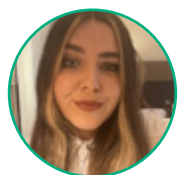
Megan Hubbard and Mark Emly were acting in a caretaking capacity from 1st June 2023-1st December 2023, taking over from the previous director Judith Hepburn, who's term finished in May 2023.

Trustees

The Trustees in office as of 31st March 2024 were:



Megan Hubbard



Shannen Woodcock



Linda Bird



Mark Emly



David Tickle



Trudi Thomas

We extend our thanks to Susan Harwood for her hard work as Trustee for Fundraising and Publicity. Susan has since stepped down from this role.

The following Trustees stepped down at the AGM in December 2023 and therefore were Trustees for part of the reporting period: Katy Hope, Alan Ramage. Thank you to you both.

Registered Address

Manor House, Lichfield Street, Tamworth, Staffordshire, B79 7QF.
Tamworth Samaritans is a registered charity with the Charity Commission, 1170514.

Thanks to our supporters

We are extremely grateful to all of our supporters, whether it is in-kind or financial support. Every donation we receive helps us to sustain our branch and therefore provide vital services to people in emotional distress. Thanks for recent support go to:

- 118 Print Group
- Tamworth Co-Op
- Central Co-Op
- Stretton, Polesworth, Dordon, Wood End, Lichfield, Whittington and Tamworth Co-Op stores
- Lea Marston Golf Club
- The National Lottery
- St George's Church Glascote
- Easyfundraising
- CareerLink
- Tamworth Borough Council
- Lichfield District Council
- HMP Swinfen Hall
- Support Staffordshire
- Network Rail
- Tamworth Train Station
- Office Recycling Solutions UK - Burton Branch
- A Russell Brickwork, and Tony Coleman
- Cathy8 and the National Garden Scheme
- Bill Smith and friends and family of Alan243
- Tamworth Cricket Club
- Tamworth Rugby Club
- Sarah Millican
- Staffordshire Family Mediation Service

And everyone who has made a personal contribution, raised funds through sponsorship, encouraged donations through friends, family and colleagues, or selected Tamworth Samaritans as the chosen charity in memory of a loved one.

Co-Directors Report

In December 2023, days before our last AGM, we took post as Branch Co-Directors for Tamworth Samaritans.

We were delighted to have been selected by the branch for this role and consider it a great privilege. We are the branch's first official Co-Directors and we really value being able to work in this way. Not only because we both work full time but because it is so very valuable to have the opportunity to share skills, experience and ideas, and have a sounding board for discussions. We love working together and are very grateful to have the support of a dedicated, knowledgeable and hard-working Branch Leadership Team, without whom we could not do this role. We are also thankful for all volunteers in our branch who make Tamworth Samaritans what it is; as reflected in our Volunteer Voice survey we are a branch that people are proud to be a part of. There are so many volunteers who take on that little bit (or a lot!) extra to keep our branch running in order to support our callers and we are lucky to have 80+ volunteers answering calls to those in need alongside a team of brilliant support volunteers.

When we took up role, we set to work aiming to address some of the things that volunteers asked us to look at as part of the director selection process. This has led to an increased focus on fundraising, some updates and improvements in branch, and what we hope to be some positive developments around communications. It was great to see such a good turnout at our branch meeting in June 2024 where we

also introduced our plans to reintroduce ongoing mentoring, which aligns to a development point arising from the volunteer voice survey. We also confirmed in July that we intend to continue delivering emails as a branch, in response to branch feedback that this is the preferred option by a majority of our members.

As new Co-Directors, we have completed a Quality Review that is a mandatory step delivered by Central Samaritans in the first few months of a Director or Co-Directors' term. This review highlighted many strengths for our branch which span a range of areas of our branch's operations, including but not limited to, training, mentoring, leaders, outreach and communications. We are also committed to developing our areas of identified focus and we are pleased to have the branch involved as part of that.

We hope you enjoy reading the updates from the rest of the Branch Leadership Team which will hopefully give you a sense of the great work of our branch since the last AGM. We are looking forward to continuing to lead the branch for another two years and want to thank all of our supporters; whether financial supporters, in-kind supporters, or both; for your much-valued contributions to keeping Tamworth Samaritans going and supporting over 10,000 callers in need by phone and email each year.



Deputy Director Reports



Leaders
Charley484

Since the last AGM Norman236 has stepped back from the role as DD for Leaders, although he is still making a huge contribution to the Branch in his other roles. I want to take this opportunity to thank him for establishing the DD for Leaders role and for all the support he gave me as I took over as DD in January and for his continued support as a valued member of the team.

The role of the Shift Leader is embedded in the way that Samaritans operates to support volunteers and callers. Shift Leaders are experienced volunteers, and all undergo training before they take up their role. To help ensure that we're consistent and stay up to date we've all completed the new online training either as an update or as part of initial training since January 2024.

As part of supporting the whole service provided by Tamworth Samaritans

there are now Shift Leaders identified for Outreach events and Prison Shifts. A dedicated area has been made in Branch for debriefing. Thank you so much to Mark423 and Chris533 who helped to make this a reality. As part of good practice, encouraged by Samaritans, the pre-shift check-in has been established and how we debrief volunteers after night and twilight shifts is under review. To white board in the duty room is now being used to update volunteers of any persistent misuse callers and to help with recognising them earlier.

Looking forwards, I will be attending the Samaritan's Regional Conference this year, with other members of the Branch. This will be an opportunity to network, share good practice and ideas with other Branches and bring these back to Tamworth.

Thank you to all Shift Leaders who've contributed to the team this year, without you we couldn't run the shifts. More Leaders are needed to enable us to provide and support the service that Tamworth are looking to develop in coming year.



Rota Management
Ed294

I lead a perfect team of six with Jan498, Alex474, Erica464, Julie522 and Richard441. Five of us take a week at a time to do our best to see that as many as possible of our 25 weekly listening shifts are filled, with Richard ready as a reserve. A Rota Working Party of volunteers met from summer 2023 until early spring 2024, looking at various aspects of the shift rota; we sent out a survey, analysed the fifty plus responses, wrote up some suggestions about changes to the rota to better support the needs of both callers and volunteers, listened to the views of the branch again this summer, and are about to roll out (and afterwards audit) a set of changes.

I work closely with the Deputy Directors for Shift Leaders and for Volunteer Care in particular, and in my spare time I analyse rota-related branch statistics and present them to the Branch Leadership Team and others.



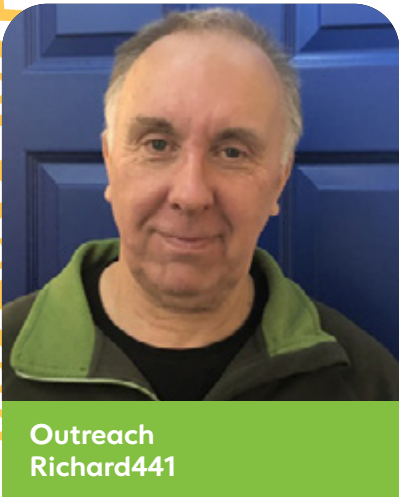
Mentoring
Katy271

One of the most rewarding roles to experience at Tamworth Samaritans is that of being a Mentor. We currently have 32 wonderful Tam Sams who have, are, or (hopefully) will be acting in this capacity. Their support is invaluable for New Samaritans after they complete the CORE Development programme, for Probationers who are progressing to Full Samaritan status, and to those Sams who are returning to duty. Since the last AGM we have collectively supported 12 New Sams and three Sams who have returned to duty, and signed off 10 New Samaritans.

We are soon to commence another element of mentoring which should provide us all with another level of support and opportunities to trust each other. Ongoing Mentoring will allow us each to be assured that our practice is safe, effective and positive.

I look forward to another period in which we work together to ensure that all volunteers are supported and experience a positive environment.

Deputy Director Reports



At Tamworth Samaritans our outreach aims to provide emotional support and promote awareness of Samaritans across our local area. We are interested in providing educational sessions in local schools and community hubs as well as being available to face to face support for our community in challenging times.

We have a large group of volunteers, all trained in providing face to face support. Currently we are working in partnership with local rail services and are exploring providing a listening service to our local canal boat users. We support initiatives run by both Tamworth and Lichfield councils and try to have a presence at as many local events as possible.



The Volunteer Care take a great deal of pride in caring for and supporting our volunteers. We send emails of support, cards and sometimes flowers to volunteers who may be going through a difficult time.

We regularly send out emails to volunteers to ask for ideas and suggestions that might improve their experience of volunteering in the branch. We have organised social events in the past and will continue to do so in the future. We hope to provide a safe place for volunteers to share their thoughts and comments on any subject they feel is relevant to Tamworth Samaritans.



The Tamworth Training Team has trained two cohorts in the last year, Autumn 2023 and Spring 2024. The Autumn cohort have now completed their Embedding training and are now all full numbers, following being signed off by some of our Lead Mentor team.

The Spring group are part way through Embedding, where they have been joined by two other volunteers, one who moved from a different branch and another who trained in Birmingham as could not make our dates. After a lot of hard work by our Trustee for Premises Mark 423, the wall in the Training Room has been removed (with the agreement of our landlord) which means we can train more in a cohort, and as a result we will be welcoming 13 new recruits to our Core training in September. Our Training Team has grown with new members attending regional TT training.



This year has been a period of change. We have had two rounds of interviews, the most recent of which was in July and August this year producing 13 new potential volunteers who are set to join the core training in September. Since the last AGM, we have also recruited support volunteers to the Fundraising and Publicity team and Finance teams.

In addition, I took up the position of Deputy Director in March along with support from Jemma494 managing the administration of the onboarding process. Three new team members are due to take their interview training early in September. This will help to spread the responsibility as well as enabling us to reach more potential volunteers both in the listening and support roles, ultimately supporting the branch in achieving its growth objectives. Looking forward our intention is to reintroduce the Information Events as a way of promoting Tamworth Samaritans and providing an opportunity for potential volunteers to gain a better understanding of what Samaritans is all about, the role and commitment of listeners and of the other invaluable supporting roles within the branch.

Trustee Reports



Trustee for Partnership - Dave161

As last year Tamworth Samaritans have three main partnerships, and we are very grateful for the mutually supportive relationships we have with all three.

Tamworth Borough Council

We are grateful for the annual grant we receive from TBC and attend events that are held in the town and surrounding area. We also regularly attend VCSE meetings organised by the Support Staffordshire organisation.

HMP/YOI Swinfen Hall

Our prison team consists of four volunteers and we usually visit the prison weekly. We train prisoners to be Listeners twice a year

and trained 14 young men earlier in 2024 and will hopefully train another group in October/November. We have an excellent relationship with the prison staff and regularly attend monthly Safer Custody meetings and other family events.

Network Rail

We maintain regular contact with Tamworth Station staff and take part in two main Samaritan campaigns; January for 'Brew Monday' and also in March for 'Small Talk Saves Lives'. Sadly there have been several incidents involving fatalities at the station during the last few months and we have visited as part of our Postvention support.



Trustee for Governance and Compliance - Trudi493

Since taking on the role at the beginning of the year my main focus and priority has been to gain a clear understanding of Risks and Risk Management Procedures and to ensure that the requirements and needs for the safety and wellbeing of our volunteers and members of the public is identified, addressed and captured within an agreed Risk Assessment and Event Information package for every external event. This package has now been written, formalised and implemented with generic documentation that can be used and adapted to suit each individual event as required.

Risk assessments have also now been generated to ensure the health, safety and wellbeing of all volunteers whilst working in branch.

Data Protection and the key policies to which Samaritans must adhere is a crucial element of my role and I am currently working towards having a working RoPA (Record of Processing Activities) to



ensure that we are compliant with the UK GDPR rules and regulations. This will be a significant area of work which will require input from all members of the BLT and will take time to produce but will ultimately provide a comprehensive register to be used as working document for years to come.

It is also vital that Data Protection is understood at an individual level therefore I will be looking to ensure that all volunteers are fully up to date with the latest modules on the Samaritans Learning Hub. I have begun to draw up a list of policies that we have and the schedule for when they are to be reviewed. This will be an ongoing piece of work. I would like to take this opportunity to thank Katy271 for all her time, help and support and for her invaluable knowledge which has been gratefully accepted in our handover.



Trustee Reports



Branch Secretary
- Linda460

My focus for the last 12 months has been to make sure we have processes in place to plan and manage our meetings and monitor progress on the decisions we take. We have also reviewed some of the systems and information sources we have to equip and support our volunteers and ensure they have what they need when listening to our callers or replying to their emails.

The information we display on noticeboards and stored in duty room folders has been checked and updated so that areas look well-kept and content is meaningful. Our electronic file system has been reviewed and restructured to make it more logical and easier to use. This work will continue next year as we ensure all key documents are available to volunteers and that they are aware of what is available.

We give out a wide range of material to a variety of people, including booklets and leaflets at events or to those seeking support, we give out merchandise to people to raise awareness of Samaritans services or to attract and inform potential volunteers. This material and information is essential to the promotion and delivery of our services and as such its organisation and management has been another priority.

Over the next 12 months I look forward to working with, and supporting, members of the leadership team and their teams. I am keen to make sure volunteers have the information they need and the administrative processes and structure around them feel confident and secure in themselves and the service we deliver to callers and people we interact with.



Trustee for Premises and Resources - Mark423

As a BLT we are extremely keen that our volunteers feel very supported and valued. An important part of this is to ensure that the premises in which we volunteer, engage with our callers and interact with each other, feel comfortable, welcoming and safe. Therefore, over this last year we have looked to continue to make improvements and respond to suggestions/reflections that have come from our team of volunteers. This is in addition to undertaking all the necessary safety checks such as electrical, fire and water quality that need to take place. Amongst other smaller actions some of the key developments that have occurred include:

- Installing a new boiler that importantly will not keep failing and will be more efficient and enable us to feel warm on shift as well as having hot water in the kitchen. As part of this process we have now established a new payment agreement with the Tamworth Financial Services offices downstairs who share the boiler and our electricity meter.

- Knocking down the wall in the training room/meeting room to provide a larger space to train more new volunteers in each cohort and to do so in an area that is less cramped.
- Providing new chairs in the duty room that are more comfortable and provide better back support.
- Tidying and sorting the debrief/quiet room, including sourcing new more comfortable chairs and putting up pictures to provide a private, welcoming and decluttered space.
- Putting a light over the key safe by the front door to enable easier and more straightforward access at night.
- Responding to the Central Samaritans initiative of a new wifi system and moving over to a VOIP system. Once fully in place this should mean there will be fewer dropped calls.
- Ensuring that the premises remain clean and tidy with the help of all our volunteers but also sourcing a new cleaning company after our previous cleaner had to stop due to ill health.
- Installing new and annually serviced fire extinguishers that cover the whole premises.

We have a wonderful team of volunteers who help maintain an oversight of our premises and resources. Thank you so much to them for everything they do, it is hugely appreciated. They are: Rachel481 who ensures that all our refreshments are kept stocked up and who responds to specific requests; Chris357 who oversees all our IT equipment and systems and links in with Central Samaritans; John361 who monitors our health and safety; and Christine520 who looks after our First Aid.

Trustee Reports



**Acting in capacity as
Trustee for Fundraising
and Publicity - Kevin529**

Over the past year, we have made significant strides in establishing and expanding the work of the Fundraising and Publicity Team. One of our key successes has been forming a partnership with Lea Marston Golf Club who selected us as their charity of the year. Their fundraising efforts have contributed significantly to our cause. We are also deeply grateful for the generous £1,000 donations received from CareerLink and Co-Op Tamworth, which have bolstered our resources alongside our longer standing agreements with Tamworth Borough Council and HMP Swinfen and a generous donation from Support Staffordshire.

Additionally, we are pleased to announce that we were awarded a £20,000 grant from the National Lottery, a major milestone in our fundraising efforts. This

donation will be reflected in the annual accounts for the financial year 2024-25 and will offset our expenses versus income position of the 2023-24 financial year. Another highlight of the year was participating in the Sarah Millican tour bucket collection, which raised a notable sum to further our work. We are so very grateful to all donors no matter the amount, as we rely on the generosity and goodwill of supporters to keep our branch going.

On the publicity front, we have been actively engaging with our community on Twitter, where we have shared our outreach and fundraising initiatives. In line with our goal to increase visibility, we are also in the process of updating our website to better reflect our work and engage with supporters.



Thank you to Susan508 for all of her hard work in establishing the team in December 2023 and achieving fantastic results. Over the coming year, we will be build on these excellent foundations with the following priorities:

- Maintaining and, if possible, increasing funding from existing partners.
- Securing further public and private sector grants.
- Building relationships with additional local councils, businesses, venues, events, clubs, and other community initiatives to explore sponsorships and other fundraising opportunities.
- Increasing the visibility and community awareness of our (wonderful) branch and the vital work we do, to encourage partnerships, participation and volunteer applications.

And my personal mission is to put fun in the fundraising. For us to work together as a branch, to come up with some brilliant, top-notch activities we can all get involved in, to help the branch maintain its financial security and achieve its longer-term ambitions.



Photo of the fundraising quiz in December 2023

Financial Report

Overview of financial report

This is the financial report for Tamworth Samaritans for the year ending 31 March 2024. The accounting period is from 1st April 2023 to 31st March 2024. The report highlights the financial performance of the branch and the purpose is to inform branch members, key stakeholders and the Charity Commission of our financial position and performance.

Key highlights of financial performance

	2023-24	2022-23
Income received	£23,788	£29,800

20% reduction compared to last year

Breakdown:

Grants	£12,039	£8,287
Donations & interest	£11,749	£21,513

Expenses	£32,822	£37,064
-----------------	----------------	----------------

11% reduction compared to last year

Breakdown:

Admin costs	£11,982	£10,191
Running costs	£8,255	£13,063
Premises costs	£12,586	£13,809

For further explanation on this, we have run a calculation on the depreciation of our fixed assets using our accounting system. This creates a further saving in expenses. We haven't shown depreciation of assets for the past few years so we have taken the opportunity to update this, this time.

Income statement

In summary of financial performance, the branch made the net loss of £8,952 for this year in comparison to £7,264 in the previous year.

The Charities Aid Foundation fund in short-term investments has closed and the investment was in the process of returning to the bank account at the time of reporting and therefore the bank balance increased to £95,230 from £69,219. The surplus cash has been put into a new investment account to earn interest which will add to our income.

The net assets of £100,412 has decreased in comparison to last year (£109,364) due to the depreciation of fixed assets. The contribution to Central Samaritans which has increased. The contribution is calculated on a set formula which Central Samaritans provide.



Balance sheet

	2023-24	2022-23
Net assets	£100,412	£109,364

Fixed assets

Tangible assets	£4,331	£8,447
-----------------	--------	--------

Current assets

Debtors	£250	£0
Short Term investments	£2,485	£31,472
Other current assets	£4,705	£0
Cash at bank and in hand	£95,230	£69,219

Creditors

Trading creditors	£-6,590	£213
Other creditors	£0	£13

Funds & Reserves

Restricted funds	£1,296	£9,853
Unrestricted general funds	£99,115	£99,510

Summary

Tamworth Samaritans hold enough funds to maintain the operations of the branch over 18 months without aiding further donation as it stands.

We are delighted that for the financial year 2024-25 we will have significant increases in income to report due to some very generous donations and some dedicated work by the Fundraising and Publicity team.

This report was created by Sulhee503, who was acting in capacity as Treasurer for the whole reporting period. We are grateful to Sulhee for her hard work and commitment during this period. Sulhee has since stepped down from this position and we are looking for a new Treasurer to join the team!



Funding

Tamworth Samaritans is an independent charity entirely dependent on funding from donations and grants.

Our volunteers all play a role in raising funds and we are always grateful for any donation, no matter the size. Should anyone wish to make a donation or discuss partnership ideas please contact us Tamworth.director@samaritans.org.

jo@samaritans.org

www.samaritans.org/tamworth

X: @SamaritansTam

SAMARITANS

Tamworth

Tamworth.director@samaritans.org

www.samaritans.org/tamworth

X: @SamaritansTam

Independent examiner's report to the Trustees and members of
Tamworth Samaritans on the accounts for the financial period ended 31st March 2024

Respective responsibilities of trustees and examiner:

The charity's trustees are responsible for the preparation of the accounts.

The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act)) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the General Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether any particular matters have come to my attention.

Basis of independent examiner's statement:

My examination was carried out in accordance with General Directions given by the Charity Commission (CC32). An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present 'a true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement:

In connection with my examination, no matter has come to my attention

(1) Which gives me reasonable cause to believe that, in any material respect the requirements:

- to keep accounting records in accordance with section 130 of the Charities Act
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act have not been met

or

(2) To which, in my opinion, attention should be drawn, in order to enable a proper understanding of the accounts to be reached.

Signed: _____

Date: 27/7/2024

Name: DAVID DAVIES

Mr David Davies
4 Moat Drive
Drayton Bassett
Tamworth
Staffordshire
B78 3UG

Tamworth Samaritans
Charity Commission Registration Number 1170514
Balance Sheet - Detail
As at March 31, 2024

GBP

Fixed Assets

Tangible Assets

Computer Equipment	3,666.00
Fixtures & Fittings	966.00

Current Assets

Customer Accounts Receivable	250.00
------------------------------	--------

Short Term Investments

CAF Fixed Int Accumulation Fund B	2,485.00
-----------------------------------	----------

Other Current Assets	4,675.00
----------------------	----------

Cash At Bank And In Hand

Lloyds Bank Business Current Account	8,010.00
--------------------------------------	----------

Lloyds Bank Business Savings Account	35,450.00
--------------------------------------	-----------

Lloyds Bank Fixed 2.00%	10,000.00
-------------------------	-----------

Lloyds Bank Fixed 3.60%	20,000.00
-------------------------	-----------

United Trust Bank 1.5% 100 day notice - Building Fund Account	21,771.00
---	-----------

Creditors

Trade Creditors	<u>(6,590.00)</u>
-----------------	-------------------

Net Assets	100,412.00
-------------------	-------------------

Funds & Reserves

Retained Funds

General Fund	<u>100,412.00</u>
--------------	-------------------

Funds Provided	100,412.00
-----------------------	-------------------

Note:

- 1) During the year £6,971.00 income was received in the form of restrictive grants. £1,567.00 was brought forward at the start of the year. At the balance sheet date, £1,296.00 remained unspent.
- 2) The trustees' policy, noting that they have no guaranteed income stream, is to hold enough funds in reserve to enable the charity to operate for 18 months in a similar manner as it operated in the previous 18 months while assuming no income would be forthcoming.

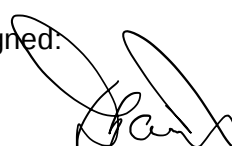
Signed:



Sul Hee Jang
Treasurer
Signed on behalf of all Trustees

Date:

Signed:



David Davies
Independent Examiner

Date:

27/7/2024