

The Catenian Association Benevolent and Children's Fund.

Annual report 2020/2021.

Despite the ongoing problems associated with the Corona Virus pandemic, preventing face to face meetings during the past year, the Board of nine Managing Trustees has met bi-monthly using Zoom. The Board has considered and made appropriate awards in respect of new applications for financial help, repeat applications, and reviewed other cases on a biennial basis. Thanks are due to Brother David Arundale, a member of the Board, for facilitating the bi-monthly Zoom meetings. The Emergency Committee has also continued to act on many occasions, to ensure that any of the qualifying beneficiaries have needed to wait for financial help, in the event of an emergency, that help often being provided within 48 hours of the request being received. Details of the many cases considered by email, were password protected, to ensure that strict confidentiality was maintained.

The nine Managing Trustees have between them a wide spread of expertise, which thus enables the Board to analyse in great detail the cases presented to them, and to provide the most appropriate and effective form of financial help required. In this way, many of the underlying problems giving rise to the application are often resolved, and future stability achieved.

Confidentiality remains the overriding principle when dealing with applications for financial help. Applicants for assistance, whether from members or dependants, can be re-assured that their particular situation will be handled with the utmost sensitivity and confidentiality, by both the Board of Trustees, and by members of the Circle Benevolent Boards.

Circles have an obligation by Rule, to ensure that they have an effective Circle Benevolent Board in place, which should meet at least once a year with the responsible Director, who is an ex officio member of the Circle Board. The CBB remains the main agency through which the majority of cases are presented to the Managing Trustees, though in exceptional circumstances, cases can be presented solely by the responsible Director. The Managing Trustees can only deal with the applications that they receive, and remain concerned that many potential cases are not being met, either due to the reticence of the individuals concerned, or to a lack of vigilance by CBBs or the wider membership of the Association.

Following widespread consultation with the members of the Association, a proposal to widen clause 18 (2) of The Scheme, by adding the words " Such relief may include assistance with the funeral costs of deceased persons, who in life were members of the Primary Class of Beneficiaries " , was approved by the Charity Commission for England and Wales on 9th February 2021.

An exciting development was the creation of a Website for The Charity by Brainstormers of Bournemouth. This project was overseen and driven by two Trustees, Brothers David Cawdery and David Rowley. The website displays all the information required to enable potential applicants for help, to be able to navigate the system, and also contains a donation button via Virgin Money Giving, to enable one off donations to be made to the Fund. The

website went live in April 2021, and regular monitoring has shown that the site is being used on a regular basis, and that donations are being made, including claims for Gift Aid when appropriate.

The Managing Trustees noted the retirement of Brother Mike O'Malley, and Brother David Rowley, Brother Mike having served as a Trustee for 25 years, and Brother David for 10 years. Thanks are expressed to both Brothers for their valuable service to the Board. They welcome the appointment to the Board by Central Council, of Brother David Brinkley and Brother Denis Murphy as Trustees, who bring their own areas of expertise to the Board.

The Managing Trustees also acknowledge and thank the following, for the efficient and effective administration of the Fund during the past year. Brother Phil Roberts, Clerk to the Trustees, Brother Mark Allanson, Chairman of the Investment Committee and the members of that committee, the Senior Administrator and Staff at Head Office, the Honorary Solicitor and his Staff, the members of the Circle Benevolent Boards and the Directors involved generating new cases, and providing information to enable the Board of Trustees to review existing cases.

Brief details of awards made during the past year are set out below.

Mike O'Malley. Chairman July 2021.

	2020/21	2019/20	2018/19
New Applications	20	22	9
From Members	15	18	9
From Dependants	5	4	0
Number of re-applications	25	21	45
From Members	19	19	43
From Dependants	6	2	2
Disbursements.			
Grants.	£209,289.	£212,305.	£98,432.
Unsecured Loans.	£455,021.	£689,169.	£517,268.
Totals.	£664,310.	£901,474.	£615,700.
Meetings held in the year.	6	5	6
Loans reviewed in the year.	57	63	42