

## Inspirational Members Day Conference

The Association's inaugural Members Day Conference in the Haberdashers Hall, London in June proved to be an outstanding success and was fully booked by delegates from all corners of the country.

It proved to be a golden opportunity for sharing experiences with like-minded colleagues and, together with an impressive array of speakers and workshops, there was a wealth of thought-provoking information for our members.

A welcoming message from our Patron, HRH The Prince of Wales, was read by Liz Fathi, Chair of the Association.

For more details and photographs see the centre pages of this Gazette.



**SAVE THE DATE!**  
**4 June 2020**

Almshouse Association  
Members Day Conference

## Community spirited students repair residents' garden seats and tables

The Bedford Almshouses in St. Mary's Close, Watford were built in 1580 and have been continuously occupied ever since. Until recently the benches and tables in the communal gardens looked as if they hailed from the same era!

But this summer the eight almshouse residents, together with ten others from the adjoining Morison and Cordery almshouses, had an opportunity to enjoy the fine weather months using some beautifully refurbished garden furniture.

The improvements were made possible thanks to ten students from the local West Herts College who responded enthusiastically

to a request from the almshouse trustees to carry out the renovations.

Residents and trustees were so impressed by the community spirit and craftsmanship of the students, who carried out the work in their own spare time, that they laid on a garden party to show their gratitude, during which the students were presented with a certificate of thanks.

The students are pictured with residents and trustees, and one of the benches. The almshouses were founded by Francis, Earl of Bedford and his wife, Lady Bridget.

*Peter M. Mould, Deputy Chair of Trustees,  
Bedford Morison & Cordery Almshouses.*



## Interest free loans and grants offered

To enable the Almshouse Association to offer the best service to members, we are introducing a new Grants and Loans process with timelines.

**All interest free loan and grant applications will go through a four-stage process as follows:**

**1. Assessment to determine whether the application for a loan/grant is eligible. Those members whose applications are unsuccessful will be offered alternative support if necessary.**

**2. Review of the assessment and recommendation by the Head of Fundraising & Charity Support and Head of Finance.**

**3. Approval of the recommendation by the CEO and offer of loan/grant to the applicant.**

**4. Report to the F&GP Committee and Board of Trustees.**

Loan application deadlines for each year will be as follows:

**Q1 February 28**

**Q2 May 31**

**Q3 August 31**

**Q4 November 30**

Applicants will be notified of the outcome within 15 working days of the applicable deadline.

For further information, call Sue van Leest on 01344 452922 or email [susanvanleest@almshouses.org](mailto:susanvanleest@almshouses.org)



## chief executive's comment

Are we the dinosaur or the crocodile?

I've just returned from a cycling holiday in the Netherlands and Belgium. Don't worry, this is not a blow by blow account of flat tyres, frothy beer and waffles by the roadside; I would like to share a few thoughts about the almshouse movement that I uncovered on my travels and how it relates to long-term planning.

In Belgium I was delighted to find many examples of the Godshuis - almshouses dating back to the 16th Century and in Holland I came across the Hofje houses. Both almshouse buildings are of a style we would recognise in the UK.

In Belgium, I am told, the almshouses (Godshuis) are now owned by the state yet retain, in spirit, some of their original objectives where they can. Those that are of historic interest have opened as museums and there are popular public tours of the almshouses in Bruges and other historic cities. Those that are not museums (and there are many) form part of the state housing.

In Holland, the almshouses hold their charitable status and are run, as close as is practical, to the benefactors' wishes. I have since sought information about other almshouses in the world and it appears that many countries have records of almshouses over the centuries but all have disappeared as charities, apart from in the UK and Holland. Although they exist as buildings of cultural interest and as general housing provision, I wonder why they became extinct as charities?

The demise of the almshouse in Europe could be for many reasons - political, lack of need (though I doubt that), lack of community support or, and this seems most likely, lack of independent funding. This last element highlights my admiration for the sound

financial management of so many member almshouse charities in the UK.

I see many examples of sound long-term planning, both with assets and WMC, that will pay dividends in 20, 30 and 100 years' time. I also find the occasional example where both assets and WMC have not been well managed and the charity has fallen into financial difficulties. This issue of the Gazette will focus on some thoughts and comments about WMC and asset management and do speak to us if you would like further advice.

Long may the almshouse movement in the UK be the crocodile and not the dinosaur! (A less aggressive example of Jurassic survival I am told is the platypus? Take your pick!)

The Dutch Almshouse Association said that their almshouses are driven by three simple requirements - their homes must be safe, secure and caring. I think that we have a lot in common with at least one of our European partners when it comes to almshouses.

We have invited the Dutch Almshouse Association to visit us in October and we will find out more about their plans and successes.

I will keep you updated and look forward to sharing the experience with you at the annual Almshouse Association Members Day Conference planned for 4 June 2020 - please look out for the programme on our website

when details are confirmed. We sold out of tickets in 2019 so the size of the venue has been increased for next year but numbers are still limited.

If you are not yet registered on our website, I urge you to do so. All the latest news is posted onto our website first and if you need help registering, a member of the team here will be delighted to help, just call!

**The Almshouse Association will celebrate its 75th Anniversary in June 2021**

The Almshouse Association was established by Leonard Hackett in 1946 and our 75th anniversary is fast approaching! Here in Wokingham, the team has been looking at ideas to mark the anniversary, raise the profile of the almshouse movement, honour the fantastic work our trustees do and show the nation the pride we have in our almshouses.

We would like to work with almshouse charities to open their doors to the public, showcasing our uniqueness; we all have a story to tell ... it would be great to see if we could hold a single open day for all almshouses. Plans are still being formulated, but as soon as we have more information, you'll be the first to know!

In the meantime, keep the week commencing 7 June 2021 in mind for our anniversary celebrations.

Have a great autumn.

**Nick Phillips**

## Pension Credit for over 75s

Recent changes to eligibility for free TV licences have brought the subject of a means-tested Pension Credit to the fore.

It is thought that many pensioners are unaware of this benefit and it has been estimated that 650,000 over 75s could get Pension Credit if they applied.

A recent article by Paul Lewis in the Radio Times explains the eligibility criteria and gives details on how to claim. To read this in full see [www.almshouses.org/news/stake-your-credit-claim/](http://www.almshouses.org/news/stake-your-credit-claim/)

*The details and opinions expressed in the article are those of the author and do not purport to reflect the opinions or views of the Almshouse Association.*



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## Calling ex-RAF men and women



Are any of your residents ex-RAF service men and women? If so, there may be assistance available from the RAF benevolent fund.

The Association has received a letter from the former government minister, Rt Hon Lord Tebbit CH, who served with the Royal Air Force flying Meteor and Vampire jets in the 1950s, before entering politics.

Having met with Air Vice-Marshal David Murray, CVO, OBE, Controller of the Royal Air Force Benevolent Fund, Lord Tebbit is urging members of the RAF family to get in touch. The fund is available now and is there for all those who need it - the Air Vice-Marshal is intent on distributing funds so this could be very welcome news for some almshouse residents.

For further information, contact the RAF Benevolent Fund at 67 Portland Place, London W18 1AR or through the website link at [www.welfareservices@rafbf.org.uk](mailto:www.welfareservices@rafbf.org.uk)

## Budgeting to look after your assets

One of the challenges many almshouse charities face is the maintenance of their buildings to ensure a legacy is left for future generations and the charity's sustainability is secured.

When it comes to your budget and thinking about reserves, there are three key elements to the survival of the charity.

1. Maximising the **Weekly Maintenance Contribution (WMC)** to a minimum of the housing benefit available (this will be looked into further in a future article).

2. Ensuring you budget for **Extraordinary Repairs (ERF)\*** - these

only need to be completed when required to ensure the longevity of the building, such as a replacement boiler, new roof, more efficient heating, replacing old wiring, new windows, etc.

3. Ensuring you budget for **Cyclical Maintenance (CMF)\*** -

jobs that need to be done

on a regular basis, such as painting outside walls, redecorating of rooms, conversion of baths to wet rooms as residents become less mobile, refurbishing kitchens to ensure residents safety and comfort.

*\*Both these funds are over and above routine general maintenance and can be invested until needed.*

Every year, it is a good idea to build a specified amount into your budget to be allocated to the ERF and CMF. These are accumulated funds and only spent when required. They should increase year-on-year and the recommended amounts invested based on the number and age of

units (as shown in the table below). The quinquennial inspection can be used to identify, prioritise and apportion costs to the planned maintenance needed over the following five years. Trustees often use the inspection report to guide them in setting the budget when planning maintenance.

These figures are often considered in conjunction with those published annually in the Almshouse Association's outline budget (see below) which is intended to provide an indication of rising prices within the building industry. The Association also has a maintenance plan to assist in

new dwellings - per unit	greater london	rest of uk
ERF (extraordinary repair fund)	£534	£491
CMF (cyclical maintenance fund)	£664	£580
Routine Maintenance	£548	£523
<b>total</b>	<b>£1,746</b>	<b>£1,594</b>
dwellings over 20 years old - per unit		
ERF (extraordinary repair fund)	£548	£508
CMF (cyclical maintenance fund)	£942	£831
Routine Maintenance	£774	£574
<b>total</b>	<b>£2,264</b>	<b>£1,913</b>

scheduling the upkeep of almshouses, which can be found on our website under 'Model Policies and Templates' - <https://www.almshouses.org/model-policies-and-templates/>

Without the comfort of an ER and CM fund, the charity could be in serious difficulty should a major expenditure for essential works become payable. Maybe not in your tenure but at some point in the future.

Should you have any questions about budget and finances, please do not hesitate to call the team on 01344 452922 or email [AlmshouseSupport@almshouses.org](mailto:AlmshouseSupport@almshouses.org)

## Importance of keeping contact details up-to-date

The Almshouse Association sends out four postal mailings every year to the Main Contact of our member charities. Mailings include The Almshouses Gazette, our Annual Report, seminar and event information and booking forms.

We also pass on these contact details to potential residents when they contact the Association looking for accommodation.

If we do not have the correct details for the Main Contact, members may find they miss out.

If you are the Main Contact for your charity and you need to update your charity's Almshouse Association Membership details, please notify the Association directly by emailing [admin@almshouses.org](mailto:admin@almshouses.org)

We will then be able to update our database, ensuring that you continue to receive all our communications and mailings. Please include the following:

Association membership number  
● Your name and position ● Name of the main contact ● Position of the main contact ● Address of the main contact ● Telephone number of the main contact ● Email address of the main contact.

Please note that your personal registration on our website is not linked to our database, therefore, if you are the Main Contact and your details change, please always contact the Almshouse Association directly. Any changes you make to your website registration are separate.

### Website registration

Have you visited our website recently?

If you have not already registered, there is a wealth of information available at the touch of a button:

● The latest Standards of Almshouse Management ● Support

and Care Manual ● Model Policies and Templates ● Latest news ● Current issues ● Seminars and booking forms ● Online training ● Meeting and event information ● Members Forum ● Panel of Consultants ● Loans and funding information ● Almshouse vacancies and job vacancy pages ● Contact form

You can also sign up to receive email updates on all the latest almshouses news and issues.

To register on our website, visit [www.almshouses.org](http://www.almshouses.org) and click on



'Website Registration'. If you are already registered, you can change your email preferences at any time by updating your registration details. Go to

[www.almshouses.org/update-details/](http://www.almshouses.org/update-details/)

## Disclaimer

The products/services and claims made in the Almshouse Gazette have not been evaluated by The Almshouse Association. Articles that recommend products/services are for information purposes only and are not endorsed by the Association.

At the time of publication, the content of this newsletter is correct to the best knowledge of the Almshouse Association's officers. Information is provided for the general guidance of trustees and clerks, who should take their own professional advice where necessary.



## New building projects - latest developments

### Financing and funding for modernising bedsits

The six almshouses comprising W C Lee's Resthouses were built in 1948 for the aged poor of Windlesham in Surrey following a generous bequest by local resident William Charles Lee (1840-1936).

The charity continues to this day, well-managed by volunteer trustees, with a thriving community of local elderly residents. Our main source of funding is the



Weekly Maintenance Contribution (WMC), collected monthly - hence Monthly Maintenance Contribution (or MMC).

Of the six units, two were cramped bedsits and thus hard-to-let. A resident's death in late 2018 provided the opportunity to convert the bedsits into one bedroom accommodation. A major project took place from January to April 2019, including gaining planning permission, architect's design, tendering of local builders and, most important of all, fundraising.

Our best estimate of the funds needed was c.£150,000 for both units and so far a wide range of donors has produced about

80% of the total (over £120,000). This has come from private gifts, public authorities, commercial operators, Gift Aid and the Almshouse Association, by way of grant/loan finance.

A contract has been signed for the first unit and demolition and building started in early August (photo below). We are confident we will have enough funding in place to go ahead with the second unit around Christmas 2019.

A major issue for us over the last six years or so has been that our MMC has been progressively falling short of the Valuation Office Agency (and Almshouse Association) recommendations. The trustees have therefore agreed a major increase in MMC (which will be the same for all six units when the project is complete).

This will mean a significant extra expense for residents from October, even though to soften the blow we will discount the Valuation Office Agency's EFR. We have also decided to seek annual revaluation so as not to fall so far behind again.

The Almshouse Association has been very helpful in their guidance on this particular point and in setting the correct maintenance contribution.

We have met with residents to explain what we are doing and the reasons for an increased MMC; following up with a letter. Naturally enough, some residents have expressed concern and we have kept the local authority entirely in the picture. They, in turn, have reviewed

Housing Benefit for those residents who receive it and are to offer guidance to those who do not. By and large the residents understand the trustees' position and found our meeting with them helpful. We have also offered confidential meetings on a one-to-one basis for anyone encountering hardship.

#### Ongoing budget

As part of the bidding process to the Association for a grant/loan we have put together a forward (and an ongoing) budget. Figures include our accounts to 30 June 2019 and a budget to 30 June 2020, which includes the following:

- An increased total MMC revenue from all six units, having the same discounted EFR
- The repayment of the Association's loan and their 5% arrangement fee over ten years
- A modest provision to cope with any individual cases of hardship caused by uplifted MMC
- A small annual surplus after providing contributions into our maintenance and improvement funds

As Lee's Resthouses trustees we have been able, through existing sound financial practices, to establish this major project, to fundraise, to liaise with the Association, the local authority, the VOA, and especially our residents. Our timeline for completion is in the future but we are nonetheless confident of success.

Robin Bell Trustee and Treasurer



buildings. The original Georgian almshouses were demolished in the 1880s and Victorian almshouses erected in their place. These were demolished in the late 1960s and the present buildings erected. It is now time to replace and improve and increase the provision for the 21st century and beyond, as the present buildings are 50 years old and showing

### Refurbishment of central London flats

The Fourth of July was not just American Independence Day, it was the perfect balmy afternoon for St. Giles-in-the-Fields and Bloomsbury United Charity to host their annual summer tea party in the communal gardens of the St. Giles Almshouses near Covent Garden, in the heart of London.

This year local politicians and partners, as well as residents and trustees, were invited to celebrate the recent refurbishment of six of the eight almshouse flats, work which was assisted by a loan from the Almshouse Association.

During the gathering, visitors were invited to view two of the vacant modernised homes - a spacious one-bedroom flat and a studio. All of the flats have been fitted out

with a new kitchen including all appliances, a new bathroom with walk-in shower, new flooring and blinds and complete redecoration.

Envy was certainly the order of the day with the newly spruced-up flats being of a higher standard than many of the visitors' own living accommodation!

Guests were welcomed by the Rev Alan Carr, Chair of the charity and Rector of St. Giles-in-the-Fields who, on behalf of the trustees, expressed thanks to everyone involved for all their hard work in complet-

ing the successful upgrade. In particular Mary Swift of Harrison Housing, who managed the project and the contractors as part of the charity's existing maintenance contract; the Almshouse Association for financial support with a loan that enabled the work to take place; and Hazel Capper, Clerk to the trustees, who liaised with residents and ensured everything came together at the right time.



It was certainly smiles all round during the occasion when, together with the excellent catering, there was much to celebrate as the charity continues its long legacy of providing support and relief to the poor in the parishes of St. Giles and St. George's, Bloomsbury.

The St. Giles Almshouses were originally founded in 1656 in the middle of what is today the intersection of St. Giles High Street, Shaftesbury Avenue and High Holborn. However, they were rebuilt on their present site in 1790, which is now Macklin Street. In 1885, the almshouses were reconstructed around the courtyard and in 2005 they were modernised to produce eight self-contained flats.

Hazel Capper Clerk  
St. Giles Parochial Charities

their age. Maintenance costs are rising and the poorly designed buildings have steps into flats, narrow corridors, stairs and ramps and insufficient room for wheelchairs or mobility scooters.

The Blackfriars site extends to c1.75 acres and this area has been transformed over the past 20 years as developers realised that the bend in the river places Bankside on a straight line between Westminster and the City. Transport links in all directions are good, so commuting is easy.

There is a wealth of amenities on the South Bank, from the National Theatre to the Globe and the London Eye to the Golden Hind, as well as the Tate Modern gallery linked to St. Paul's over the Millennium Bridge. In short, the Blackfriars site is worth about £100 million, even without planning permission.

The charity is seeking approval to erect a substantial office development on the road frontage with a new almshouse to the quieter rear. This will provide at least 50 units, thereby doubling the present provision.

If our calculations are correct then the office development will generate sufficient capital to pay for the new Blackfriars almshouse and a new almshouse with 80 units (also double the present 41) at our southern site, as well as increasing income through new ground rents and rental on retail units.

This is only possible because previous trustees, guided by the founders wishes, retained the ownership of the site and the present trustees, animated by the same principles, will be able to bequeath an even stronger charity for the benefit of future generations.

Chris Wilson Clerk to the Trustees

### new members

A warm welcome to new members

T & M Greg Trust,  
Buntingford, Hertfordshire  
Clare Combined Charities,  
Suffolk  
Adams' Eleemosynary Charity,  
Shropshire  
Great Shelford Parochial Charities,  
Cambridge

### New windows and intercoms in Salford

The Humphrey Booth Housing Charity based in Salford is embarking on a development programme for 42 of the 44 homes in its management.

The 44 well-maintained almshouses are based on three estates in Salford, Greater Manchester at Mainprice Close (eight homes), St. James Close (20 homes) and Winstanley Close (16 homes).

The estates comprise studio, one bed and two bed properties at ground and first floor level. In 2012 the Humphrey Booth Housing Charity made the first major capital investment in new almshouses in 30 years, building two disabled access bungalows. These are not part of the current development programme.

Beginning in August 2019, the 42 remaining homes will have new intercom entry systems, and uPVC double glazed windows will be installed at an approximate cost of £126,500. The existing windows will be recycled.

The improvements are being funded by the Humphrey Booth Housing Charity's own resources, through its Development Fund, which forms part of the housing charity's designated reserves and was established from the proceeds of stock disposal.

Sheila Jones CEO/Housing Manager  
The Booth Charities

### NAACIF fund changes

M&G are proposing changes for the future management of assets.

Key among these are to broaden the investment mandate across a wider range of global assets, reducing annual fees from 0.60% to 0.50%, and opening access to all UK charities under the new fund name "M&G Charity Multi Asset Fund".

Shareholders were invited to vote ahead of the EGM scheduled for Friday 4 October. If members have any questions, please contact Richard Macey at M&G direct on 020 3977 3623 or [charities@mandg.co.uk](mailto:charities@mandg.co.uk)

### Safeguarding future generations through careful land management

Southwark Charities is a relatively recent creation which merged together two older almshouse charities and several supporting charities.

We currently operate two almshouses, one in Blackfriars originally founded by Edward Edwards in 1717 (photo right) and one just off the Old Kent Road founded c1852.

Edwards' original legacy was property and the trustees were required to retain the rental income until they had accumulated enough funds to purchase a site, then continue to save to construct almshouses.

The whole estate took over 40 years to build in a somewhat piecemeal fashion. Because of the

founder's stipulation, the trustees were always reliant on the retention of property to fund the activities of the charity and for rebuilding, replacing or extending the accommodation as it became unsuitable or inadequate.

Over the centuries successive surveyors dangled the prospect of relocating to an urban setting before the trustees, realising a significant capital sum from the sale of a city location. But the trustees stood firm and insisted that the founders' wishes were to serve those "in need, hardship or distress" in this area and so instead they found the means to update the



buildings. The original Georgian almshouses were demolished in the 1880s and Victorian almshouses erected in their place. These were demolished in the late 1960s and the present buildings erected. It is now time to replace and improve and increase the provision for the 21st century and beyond, as the present buildings are 50 years old and showing



A large number of almshouses are fine Listed Buildings and whilst these provide splendid living examples of our national heritage, necessary compliance with conservation and Listed Building requirements leads to inevitable challenges for trustees. Costs of repair and modernisation are also proportionately higher than in the case of other types of property.

As a nation we have a long-established interest in our history, of which architecture has played a major part. By the late 18th century large private collections acquired from antiquity were transformed into public museums and a wide interest developed in learning about the past and distant civilisations.

The formalisation of the planning system commenced with *People and Planning: Report of the Committee on Public Participation - the Skeffington Report of 1969* which gave

ing, over and beyond listing, aims to provide a full, rounded understanding of why an historic building or place is valued and by whom.

The National Planning Policy Framework (NPPF) makes various references to the concept of 'significance' rather than 'special architectural or historic interest' as the principle form of assessing the appropriateness of

proposals for development within historic environments. Proposals for change or

development need to address the statutory designation of the building and why it is considered to be of special architectural or historic interest.

Consideration also needs to be given as to the reasons why the building is of cultural importance and the likely results of consultation, particularly with the statutory authorities and national amenity groups. Proposals for change should always involve



## Decorative renovation improves unsightly rear yard

For many years the listed buildings of the Law Memorial Almshouses in Bishops Tawton have been blemished by an unsightly, dilapidated concrete yard at the rear. The trustees spent more than a year considering how best to refurbish the area having discounted laying stone slabs because of the cost implications and the risk of damaging the various service pipes lying underneath or embedded in the concrete.

In the end, they settled on the use of tarmac over the existing concrete, with various decorative stone additions to break up the 'playground' appearance that might otherwise have arisen. The project was undertaken by Mark Yeo & Son Ltd of Barnstaple and the results have been greatly admired and applauded by the trustees and residents.

In July a celebration was held to mark the completion of the work, attended by the trustees, residents, contractors and other guests.

Richard Vain Secretary

research and understanding of the building in the first instance. Applicants need to describe the significance of any heritage asset affected, including any contribution made by their setting. Local authorities are required to identify and assess the significance of any heritage asset that may be affected by a proposal. Consultation at an early stage with those having an interest in the future of the building or place is important. A constructive dialogue and working partnership is vital to gaining support for proposed changes. Wherever possible, the architectural interest and historic fabric of the property should be



Above: Chairman of Trustees, David Burgess, officially reopens the rear yard. Far left: 'before' and 'after'.

covered in full. Matters concerning conservation, architecture or development tend to be a matter of judgement or opinion and often different views will prevail. The hope is that there will nevertheless be a considered view and the best approach may be to manage expectations and endeavour to build consensus rather than plan to achieve unanimous support.

Should your charity entail Listed Buildings and the trustees require advice concerning planned modernisation or development, it may be that the Almshouse Association's Panel of Consultants is able to assist. Visit [almshouses.org/panel-of-consultants/](https://almshouses.org/panel-of-consultants/)

## Considering the repair, alteration and restoration of historic buildings

individuals and communities the right to comment on proposals for change within the environment. Today a strong interest in conservation, development and architectural matters continues to prevail which extends beyond the owners of property and professional advisors to the public domain.

### Character and history

In the 19th century there were an increasing number of projects involving the restoration of dilapidated ancient buildings which caused architects to impress the need to preserve the character and history of these properties.

In 1877 a "Manifesto for The Protection of Ancient Buildings" was published which emphasised two key principles for the care of historic buildings: they should be regularly maintained to keep them in sound, usable condition and repairs should not include scraping away layers of history which are an intrinsic aspect of the building's character and architectural interest. These principles became highly influential and indoctrinated in the statutory system of protection that was to follow. The Society for the Protection of Ancient Buildings (SPAB) advocates an approach of 'anti-scrape' for repairs to historic buildings which continues to influence the thinking of modern conservationists.

**Listed Buildings:** The 1947 Town and Country Planning Act introduced the 'listing' of buildings by the Secretary of State for their 'special architectural interest'. A national list exists of buildings of special architectural or historic interest and each building included is regarded as being of national importance irrespective of whether they are Grade I, II\* or II. Listed Building consent is required in order to carry out work which would affect the building's architectural or historic interest. It is usual for planning authorities to require applications to be submitted for any work to a Listed Building in order to control quality.

### Enhancing appearance

**Conservation Areas:** These were introduced by way of The 1967 Civic Amenities Act with the purpose of designating both urban and rural areas to protect their character and appearance. While the Act was aimed specifically at areas rather than buildings, many Conservation Areas include buildings which are listed or scheduled. The 1990 Planning Act [Section 71(1)] requires local planning authorities to pay special attention to preserving or enhancing the character or appearance of the area concerned.

It is acknowledged that historic buildings or places may be important because of their aesthetic, historic, scientific or social value as well as their architectural interest and in April 2008, English Heritage published Conservation Principles which related to 'evidential, historic, aesthetic and communal value'. Past human activity, connection to past people and events, and the ways in which sensory and intellectual stimulation may be drawn from a place are taken into account. The 'significance' of a build-

## Policy and Governance - national news insight

### Charities and Charity Law

**1. July 2019 - The Charity Commission** has published the latest Charity Commission News.

The contents cover:

- Charity whistleblowers
- New guidance for charities with a connection to a non-charity
- Display name changes and how to apply for a dispensation
- Changes to updating charity details and what information is covered in the service
- Guidance on preparing an annual return
- How to assess risk for charities working internationally
- HMRC's criminal offences for failing to prevent tax facilitation

**2. July 2019 - Annual Report and Accounts 2018-19:** The Commission has published its annual report and accounts 2018 to 2019. This includes a section which commends the Almshouse Association as an umbrella body it has worked with.

**3. June 2019 - Update on reporting serious incidents:** The Charity Commission has made changes to the procedure for submitting serious incident reports on behalf of the trustee body. Charities can now use the Commission's online form. The Commission has also issued a privacy notice explaining how it processes personal data when you report a serious incident using its online form or template for bulk reporting. The notice is supplemented by the Commission's main privacy notice, which provides further information on how the Commission processes personal data and sets out your rights in respect of that personal data.

**4. May 2019 - Cyber-crime:** the Commission has published an alert which provides information and advice to charity trustees about cyber-crime and how to report it. This follows the Government's Cyber Security Breaches Survey 2019 which revealed that over two-thirds of high income charities had recorded a cyber breach or attack in 2018. The vast majority of those affected (80%)

had been the result of phishing attacks (i.e. fraudulent emails). The alert contains advice on how you can protect your charity and how to report cyber-crime and fraud.

### Property and Planning, Housing

**1. June 2019 - Selective Licensing:** MHCLG has published the outcome of the independent review of the use and effectiveness of selective licensing. The report finds that selective licensing is an effective tool when implemented properly, and identifies a range of areas where the operation or implementation of selective licensing schemes could be improved. There is a dedicated section to almshouses and other charities and concludes: "This review supports such the introduction of exemptions for purpose-built student accommodation that follows a Government approved code and non-profit charitable residential institutions (Almshouses) that are not registered social housing providers".

Please also refer to the Almshouse Association's *Latest News* article on Selective Licensing - <https://www.almshouses.org/news/selective-licensing-fantastic-news-for-almshouses/>

**2. May 2019 - Political debates and questions on housing issues in Parliament - Specialist housing for older people:** Members of the House of Lords have discussed the provision of suitable social housing for older people following a question tabled by Baroness Kennedy of Cradley. Lord Kennedy of Southwark, who asked the question, drew the house's attention to his relevant interest as a trustee of United St. Saviour's charity (an Almshouse Association member).

### Taxation

**1. June 2019 - Council tax:** The former leader of West Lindsey District Council is calling for the authority to cut taxes for residents of almshouses. Cllr. Jeff Summers believes the facilities could be helped further by being exempt from council

For web links and full details, visit: <https://www.almshouses.org/news/policy-and-governance-latest-developments/>

tax, or seeing it cut sharply. Separately, MHCLG has published guidance on paying the right council tax which includes advice on the various exemptions and when they apply. The guide explains how each bill is set and how individuals can confirm whether or not they are paying too much in council tax.

### Appointments

**1. July 2019 - Conservative Party:** Boris Johnson was elected as leader and subsequently became Prime Minister, replacing Theresa May. He has announced a number of changes to his cabinet, with a new Chancellor (Sajid Javid), Home Secretary (Priti Patel), Culture Secretary (Nicky Morgan), Secretary of State for Housing and Communities (Robert Jenrick) as well as other changes at MHCLG. Andrea Leadsom is the new lead at BEIS and Theresa Villiers takes over at Defra. Rebecca Pow appears to have retained her heritage portfolio as parliamentary Under Secretary for DCMS. Baroness Diana Barran, a charity founder, former chief executive and trustee, was announced as the minister for civil society.

**2. July 2019 - Liberal Democrat Party:** Jo Swinson has been elected leader, the first woman to hold the role in the party.

### Miscellaneous

**1. June 2019 - Recruiting older volunteers:** The Centre for Ageing Better has published a free guide to help charities recruit a more diverse pool of older volunteers, warning that if the sector does not adapt the number of volunteers could fall. Age-friendly and inclusive volunteering guide has been published as part of Volunteers' Week. It offers help to organisations so they can avoid missing out on the talents of people in later life and gives examples and recommendations to recruit and retain older volunteers.



# Members Day Conference and Almshouse Association Awards



Dr Alison Armstrong of Whiteley Village Trust

Our inaugural Members Day Conference proved to be the inspirational day we hoped it would be.

Held at the stunning Haberdashers Hall, West Smithfield, London on Wednesday 5 June, 2019 it meant an early start for all the Almshouse Association staff, setting up and making sure we had everything in place to greet our members.

The day began with Chief Executive, Nick Phillips welcoming a full house to the first Members Day Conference in the impressive Livery Hall, followed by Liz Fathi, Chair of the Almshouse Association, who briefed delegates on the future plans for the Association.

Dr Alison Armstrong was the first of our speakers who took to the stage and talked about the research being undertaken on almshouse living by Whiteley Village, the Almshouse Association, Anglia Ruskin University and AgeUK.

Helen Boyd, Safeguarding Seminar



**“Love the format - really feels like a Members Day and that one can actually participate”**

*comment from a Member feedback form*

Following the AGM section of the Conference, Keynote Speaker, Jon Sparkes, CEO of Crisis, spoke of his experiences on the very topical issue ‘Homelessness and the Affordable Housing Challenge’.

Question and Answer sessions followed lunch, when our panel of experts were put through their paces with a variety of questions and, had time permitted, we know there were a lot more questions and answers that members were eager to explore.

Liz Fathi read out a message from our Patron, HRH The Prince of Wales, following which the Patron’s Awards were announced.



Conference delegates (left) were each presented with a comprehensive information pack (above)

**“The collective experience in the room was amazing”**

*Paul Mullis, DAMHA*

## Patron’s Awards



Patron’s Awards (from left):  
Chandos and Dent’s Almshouses,  
Charity of James Goodman,  
The Mills Charity

Patron’s Awards went to three outstanding projects completed in 2018

- Chandos & Dent’s Almshouses, Winchcombe, Gloucester
- Charity of James Goodman, Cranfield, Bedfordshire
- The Mills Charity, Framlingham, Suffolk



**The Almshouse Association introduced two new awards for 2018: ‘Excellence and Inspiration’ and ‘Gardens and People’**

## Excellence and Inspiration Awards



Excellence and Inspiration Awards went to:

- Worcester Municipal Charities
- Mabel Luke Charity, Newbury, Berkshire
- The Finchley Charities, London
- A group of four charities working together:  
Harborne Parish Lands Charity, Lench’s Trust,  
Sir Josiah Mason Trust, Yardley Great Trust
- Peter Birtwistle Trust



Excellence and Inspiration Awards (from left): Finchley Charities, Josiah Mason Trust, Peter Birtwistle Trust, Worcester Municipal (above)

Throughout the day, delegates were given a choice of talks and were treated to expert information from a host of specialists:

- Helen Boyd on Safeguarding Vulnerable Adults
- Chris Drinkall of Rollits LLP on Mediation: Avoiding and resolving disputes
- Tim Rutherford of Stone King LLP on Update on Legislation and Regulation
- Gerry Morrison of Rollits LLP on Setting Aside Scenarios
- Sean Stafford, Kathy Green of ACL and Carolyn Sims of Charity Bank on Loans, Grants and Project Management.

all presentations can be found on our website at:  
[almshouses.org/presentations-from-2019-almshouse-association-members-day-conference/](http://almshouses.org/presentations-from-2019-almshouse-association-members-day-conference/)

During breaks our delegates were able to visit exhibitor stands to learn about the different services on offer and enjoy the networking opportunities. Feedback forms report how much everyone valued interaction with trustees from different charities and Almshouse Association staff.



Exhibitors and delegates networked during breaks



## Gardens and People Awards



The Almshouse Association Gardens and People Awards for charities that have encouraged residents to take part in community projects, such as gardening. The following charities were presented with Gardens and People Awards:

- Hammersmith United Charities, London
- Rogers Almshouses, Harrogate, North Yorkshire
- The Eventide Homes, Bournemouth
- Tiverton Almshouse Charity, Taunton
- St. Giles Almshouses at Wilton United Charities



Gardens and People Awards (from left): Hammersmith United Charities, Rogers Almshouses, The Eventide Homes, Tiverton Almshouse Charity (above)



above: Keynote speaker General Sir Mike Jackson and (below) with Nick Phillips, Chief Executive.

## Keynote Speaker

Keynote Speaker, General Sir Mike Jackson, closed the day. Drawing from his extraordinary military career spanning almost 45 years - from Officer Cadet to Chief of General Staff, the highest level of the British Army - he delivered an inspiring and uplifting speech, ensuring the Almshouse Association Inaugural Members Day Conference finished on a wonderful high!



right (r-l): Keynote speaker, General Sir Mike Jackson; Association Chair, Liz Fathi; Chief Executive, Nick Phillips; and Board trustee, Willie Hartley Russell.



"Thank you to all. There was a real 'buzz' about the day ...  
... excited to feel part of such a progressive and forward  
thinking almshouse movement"

*comment from a Member feedback form*

# The Almshouse Association 2019 Awards

Applications are invited for the

**2019 Patron's Award**

**2019 Gardens and People Award**

**2019 Almshouse Association Award  
for Excellence and Inspiration**



The Almshouse Association has great pleasure in announcing to members that we would be delighted to receive submissions for projects completed during 2019.

**Don't hide your almshouse under a bushel!**

**We would love you to apply for an award to recognise the great things you are doing in your almshouse.**



Our Guidance & Submission Format, as well as Tips and Design Guidance can be found at

[www.almshouses.org/almshouse-association-awards/](http://www.almshouses.org/almshouse-association-awards/)

or call the team on 01344 452922

**Deadline for entries – Monday 13th January 2020**



## Local community joins in with anniversary celebrations

Firth's Homes in Sheffield held a garden party in July to celebrate 150 years of the charity's formation.

Invitations went out to the surrounding community and despite torrential rain the night before, many local people joined residents to enjoy a sunny day. Deepcar Silver Band provided entertainment and there was a hog roast and pop-up bar.

Firth's Homes began 1869 and ever since then the annual meetings have been minuted, providing a fascinating record of life both at the home and of society in general.

The almshouses were endowed by Mark Firth, whose portrait (with his sister) hangs in the community hall. The Home was originally overseen by

a chaplain and two years after the opening he reported: "The persons who have been elected are very proper objects for such an institution. All are of good moral character - most of them decidedly pious."

The 'inmates' had rules to abide by, such as attending the Sunday Service and the week-day church service each day but all were grateful for the homes provided for them.

Today the almshouse provides 32 modern one-bed homes and there is a resident warden to give assistance.

Helen Sweet  
Sheffield Firth Homes



## Neighbour gifts stonework drawing to commemorate day

Built and endowed by Ellis and Nicholas Crispe, the almshouses in Marshfield, Gloucestershire celebrated their 400th anniversary with the local community in July. Celebrations were hosted by the trustees and residents, with music from a string quartet and wonderful choice of home-baked cakes.

The chapel, nestled in the middle of the row of cottages, displays the Coats of Arms of the Skinners and Salters Company, to which the Crispe family were linked.

Neighbour, Brian Weaver, presented the trustees with a drawing of the stonework to commemorate the day.

Over the years, the trustees have worked hard to update the almshouses to create separate kitchens and bathrooms, install central heating and landscape the gardens for accessibility. Some of this



work was supported by an Almshouse Association loan, local fundraising and housing grants.

Today, the almshouses are an integral part of the community, and the strong board of trustees have ensured that they will be there for the next 400 years.



## Retirement at Westerham

Jane Edwards has retired after 22 years service on the Board of Westerham Almshouse Charity in Kent, with the past 16 years as chairman.

The 17 well-appointed flats are located in three separate buildings in London Road, Vicarage Hill and New Street and the trustees take a close interest in the welfare of residents.

The almshouses were originally built for people who had been in service and for farm workers in tied cottages who needed somewhere to live when they retired.

Today an applicant must have lived or worked in Westerham or Crockham Hill for a minimum of two years, be of pensionable age, able to look after themselves and have very limited funds.

Jane has devoted a great deal of time and effort to the role of chairman and has provided inspired leadership of the Board. She will be sorely missed.

## Safety first is the seasonal message at Christmas

Christmas and the New Year are only a couple of months away and soon visits will be made to store cupboards and loft spaces to retrieve last year's festive decorations for displaying in communal lounges and in residents' homes.

Decorations signify that special holiday time of the year but the lights and decorations do bring an element of fire risk if care is not taken by the trustees, staff and residents.

The 'Duty Holder' (trustees) must take steps to ensure that the necessary level of safety is maintained throughout their almshouses, which includes the "In-house and Duty of Care" management of fire safety. This may involve liaison with either the almshouse fire safety adviser and/or the local fire service fire safety officer.

### Additional precautions

It is to be expected that residents will decorate their accommodation with lights, decorations and candles (if permitted). With appropriate care and attention, decorations and lights can be safely used, although candles are not to be recommended.

When introducing Christmas trees and decorations, additional fire safety precautions should be carefully considered, especially in open access areas or communal rooms where residents, visitors and others have access. Decorations positioned in fire escape routes and adjacent to fire exit doors should be actively discouraged.

A burning Christmas tree along with its decorations will rapidly fill an area with fire, acrid smoke and deadly gases. It is with the safety of all residents, staff, visitors and other building users in mind, that the following recommendations are made:

**Choice of tree:** ● Where possible use artificial trees ● All artificial trees should be

## Attending the Royal garden party

I was greatly honoured to be nominated by the Almshouse Association for an invitation to HM The Queen's Garden Party.

On the day the sun shone and, having arrived a little early, my daughter, Catriona and I promenaded as gracefully as we could in our high heels around St. James' Park (having, of course, sensibly ignored all advice about wearing comfortable shoes!).

We were joined by a number of other "early birds" in fancy dress and exotic headwear, much to the bemusement of foreign schoolchildren who openly marvelled at the eccentric customs of the English!

We eventually joined the throng, queueing in the polite and obedient way the English excel, to gain entry to the palace, all happily taking photographs of ourselves to prove to our friends and families how important we were.

Their Royal Highnesses Prince Charles, The Duchess of Cornwall and Princess Anne were present, the gardens were beautiful, the event smoothly organised and we thoroughly enjoyed the few hours ambling around, without a care in the world (apart from aching feet) before returning to our humdrum lives in



Salisbury where, of course, nothing ever happens!

Susie Coen Clerk, Salisbury City Almshouse & Welfare Charities

flame retardant ● Fibre optic trees and lights should conform to the appropriate British Standard. Always look for the British Standard kite mark.

If a natural tree is chosen, it is considered that a Risk Assessment should be



carried out and submitted to the trustees or local fire service for approval.

**Position of tree:** ● Trees must be securely positioned in place ● Ensure that the trees do not compromise any escape routes or fire exit doors opening from the building.

Christmas trees should not be positioned: ● Adjacent to or near fire exit doors or fire exit routes ● In staircases, staircase landings or entrance foyers ● In areas with a high fire loading (combustible materials).

**Christmas tree lights:** It is strongly recommended that all decorative lights should be of the LED type and operated by battery. Mains electrical decorative lights should only be used if they are: ● Connected through a local RCD plug or socket ● Incorporate a plug-in transformer ● Are under a year old or, if older, have been subject to a current portable appliance test (PAT) ● Lights should not be left on when the room is not in use or outside of normal working hours or use hours.

**Christmas decorations:** One of the most common sources of fire at this time of year is when Christmas lighting is placed too

close to combustible decorations, or when lighting and decorations are allowed to come in contact with combustibles.

Even when the decorations have been positioned with care, it is not uncommon for them to become dislodged or moved as the festive period continues. In extreme cases when hot lamps, light bulbs or decorative candles, etc., are brought into contact with highly flammable paper or plastic decorations it can result in a fire.

Metal strip type of decorations must not be fastened to or in close proximity to any electrical fittings (mains and low voltage) as they can conduct electricity.

Ensure that the decorations do not compromise the means of escape routes, staircases, landings, hallways and fire exit doors that open to the outside.

### Risk assessment

**Candles and tealights:** Naked flame candles, oil burning lanterns and tealights should not be used at any time. Low voltage battery operated candles, lanterns and tealights offer a safer alternative.

**Fire Risk Assessment:** The almshouses' fire safety consultant or a local fire service community fire safety advisor should be asked to carry out a review of the fire safety arrangements, with recommendations that additional fire safety checks should be carried out over the festive duration when the trees and decorations are in place.

Almshouse residents who have their own decorations and trees should also be the subject of a courtesy inspection from a trustee or competent person.

Harry Paviour M I Fire Eng. FIIRSM. Dip  
SM M.Ed. Pg. Dip Ed  
Fire Safety Consultant, member Almshouse  
Association Panel of Consultants  
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## News on the web

[www.almshouses.org](http://www.almshouses.org)

It is impossible to squeeze all the news and articles we receive into our quarterly Gazette, so don't forget to check out the Almshouse Association website at [www.almshouses.org](http://www.almshouses.org)

The following articles, amongst others, can be found in our members area, under Current Issues:

- Are you up-to-date with the Good Work Plan?
- Charity Risk Barometer 2019 - risk and reward in an uncertain world
- In search of a lost Will (see synopsis below)

## Search for lost Will

As part of the 600th anniversary of the John Marler Charity in Kelvedon, Colchester, treasurer and trustee John Hackworth has been searching for the Will of the original benefactor.

He writes: John Marler of Essex declared land and tenements in his Will for the benefit of the poor of Kelvedon. The Will was apparently dated June 20, 1419. I say apparently because nobody seems to be able to find the Will although there are authoritative accounts of it.

Two readily accessible documents written nearly 200 years ago attest to the date. If the date is right, the John Marler Charity, which to this day runs the almshouses in Church Street, was 600 years old in June.

A Charities Commission survey tells us that the charity is the 24th oldest in England and one of the oldest almshouse charities still active.

The full article can be read on the Almshouse Association website.



## Surprise party

There was a surprise for Spalding almshouse resident Vera Clarke when residents, trustees and staff held a party in St. Norberts Community Hall to celebrate her 100th birthday.

Vera Peace Clarke (nee Coulson) was born in Delgate Bank, Weston Hills. Her middle name of Peace was given as she was born on the day the Treaty of Versailles was signed.

She has lived in South Holland all her life and her first job was working on the land in the village, aged just 14. Vera has two daughters and a son, as well as five grandchildren, nine great grandchildren and five step great grandchildren. Her husband Lawrence died 40 years ago,

Vera is still very active, regularly walking into town, and always attends the outings organised by Spalding Town Husbands which administers the almshouse charity where she has lived for 38 years.

Chairman of Trustees, Robin Hancox, presented a bouquet of flowers before residents enjoyed afternoon tea and community singing.

Vera brought her birthday card from HM The Queen to proudly show to other residents and enjoyed a week of celebrations, including a party organised by her family and friends.



## SPOTLIGHT ON:

### Alan Martin

Company Secretary of the The Yardley Great Trust who recently stepped down from serving on the Almshouse Association Board of Trustees.

#### Reflections

I started working in social housing straight from leaving school in 1973 and spent some years at Birmingham before spells at Tamworth and Redditch councils. The latter position involved having responsibility for a district and ensuring tenants observed their conditions of tenancy. I grew a little disillusioned with the political involvement in council housing and moved into the housing association sector with what was then Harden Housing Association, initially taking responsibility for the housing management service in Worcestershire, followed by developing special projects and eventually managing the introduction of a computerised housing management service.

During this time I watched the metamorphosis of the housing association movement, encouraged or even driven by the Government, with dismay. Many associations moved from local community based organisations to regional or national monoliths; many mergers taking

place that seemed driven by the desire to manage ever higher numbers of dwellings, rather than improve service for residents. I wondered whether I would ever be content in my day job when I heard that Yardley Great Trust wanted a Chief Executive following a critical report from the Housing Corporation (as it was then called).

When I delved into the word of almshouse charities, I was thrilled - a local housing service managed by local people and likely to stay that way. That was in 1995 and my tenure here has been so enjoyable, helped in no small measure by challenging but supportive trustees.

The regional member of what was then called the Executive Committee of The Almshouse Association, Jenny McGowran, retired in 2008 and asked if I would be interested in taking her place. I

was delighted to do so and have enjoyed my tenure on what is now correctly called the Board of Trustees. Having done 10 years I now need to concentrate on the day job in the years leading to my retirement and have reluctantly resigned from the Board. In doing so, I



would like to record my admiration for the current Chair, Liz Fathi. From day one on the Board, I felt things needed to change but there seemed no desire to do so.

As new people were appointed, the number in favour of change increased but none of us felt able to devote the time needed to push things through until Liz took "the bull by the horns". She has now been Chair for two years and with incredible stamina has overseen many changes, all of which will benefit the Association and the movement long-term.

As for the movement, I see a bright future but there are things we all need to do to retain the confidence of Government. We absolutely have to ensure that residents are treated as consumers of a service, not passive recipients of charity. This involves setting and maintaining high standards of housing provision and management and involving residents in the service.

The Birmingham Almshouse Charities are leading the way here with their sponsorship of a joint residents' scrutiny panel under which resident representatives from all the charities are assisted by a paid consultant to scrutinise the approach of each charity. The first topic they considered was complaints and they have made many thoughtful suggestions for improvement.

The other crucial change that needs to happen is that the movement must become more representative of society as it is today, which means greater involvement at all levels of the movement by people from minority groups. Almshouses need to demonstrate much greater resident diversity, and a more diverse group should be represented in the trustees, including the Almshouse Association Board of Trustees. There are many high net worth individuals in all communities and I cannot think of a better way for people to invest for the benefit of society than to fund housing for people in need.

Alan Martin



## Confusing outlook could provide more positive news

### Expecting to be surprised

As recently as May 2019, forecasts for the global economy were broadly positive. When the Bank of England published its May inflation report, it noted expectations that economic growth would soon stabilise before recovering towards its potential rate by the middle of the year.

Since then, the news flow for investors has taken a turn for the worse. Trade tensions between the world's two largest economies, China and the US, business

Markets initially responded to this gloomier outlook by anticipating supportive policies from the world's central banks, including cuts to interest rates.

In light of expectations of lower interest rates, bond prices rose sharply during May and June.

Global stock markets also rose sharply in June, recovering from weakness in May. The S&P 500 index of the largest listed US companies' shares rallied by over 8% through June and July, bringing total

change of prime minister heralding a greater likelihood of leaving the European Union without an agreement.

Mark Carney, the governor of the Bank of England, articulated concerns that UK asset prices and the value of sterling have 'become increasingly inconsistent with the smooth Brexit assumption' that underpins the Bank's projections.

It is clear that both macroeconomic and political forecasts are constantly changing. Indeed, there is a surprisingly weak relationship over the short term between financial markets and news flow.

But I believe there is one clear message from all the chaos and confusion. When investor sentiment is very poor, as in the UK today, there is more scope for positive surprises, and vice versa.

We know that UK assets will have to navigate Brexit developments this year but, with many concerns factored in to prices already, there might be less scope for negative shocks. As ever, we must continue to expect to be surprised!

*We are unable to give financial advice. If you are unsure about the suitability of your investment, speak to your financial adviser. The views expressed in this document should not be taken as a recommendation, advice or forecast.*

15 August 2019

Jenny Rodgers  
Investment Manager, M&G Investments

### Single year total return (income plus growth of capital) performance %

from to	01.08.18	01.08.17	01.08.16	01.08.15	01.08.14
	30.07.19	30.07.18	30.07.17	30.07.16	30.07.15
<b>NAACIF</b>	<b>3.9</b>	<b>6.6</b>	<b>12.7</b>	<b>8.7</b>	<b>4.7</b>
FTSE All-Share Index	1.3	9.2	14.9	3.8	5.4

confidence and investor sentiment have all deteriorated.

The Bank of America Merrill Lynch fund manager survey in early June 2019 showed that fund managers were more worried about the outlook for the global economy than at any time since the financial crisis of 2008. Indeed, the upcoming season of company results in the US is likely to show profits falling year on year, representing the first earnings recession since 2016, according to The Economist.

returns (the combination of income and growth of capital) from the index to over 20% from 1 January to 31 July 2019. UK shares have not risen as strongly but the FTSE100 Index of larger companies still returned over 15% during this period.

Ascending share prices this year have confused many commentators since they have continued in spite of downgrades to corporate profit forecasts. In the UK, the outlook is particularly complicated by the uncertainties surrounding Brexit, with a

## Almshouse signs up to LGBTQ rights

Sir Josiah Mason Trust in Solihull has signed up to the HouseProud Pledge, a scheme designed to ensure lesbian, gay, bisexual, trans and queer (LGBTQ+) residents are able to enjoy their homes without fear of discrimination.

The Pledge was developed by HouseProud (a network for LGBTQ+ people working in social housing) and the University of Surrey. By signing up, the Trust is committing to improve its services for LGBTQ+ residents and is expected to deliver on three core commitments within the first year:

- Ensuring LGBTQ+ residents have an input at an executive/strategic level
- Increasing LGBTQ+ visibility through the use of the Pledge symbol
- Initiating a programme of staff training to improve understanding of LGBTQ+ lives.

The HouseProud Pledge follows the University of Surrey's 'No Place Like Home' study, the largest of its kind in the UK, designed to understand the experiences, concerns and preferences of LGBTQ+ social housing residents.

The study found a third of LGBTQ+ residents felt their neighbourhood was

not a safe place to live and a third of survey respondents felt their landlord was not able to deal effectively with issues like harassment. A fifth of gay men reported that they regularly modify their home if visited by their housing officer or a repairs person to make their

sexual orientation less visible (eg. moving pictures, books and DVDs).

David Healey, Chief Executive, said: "We are very happy to be a pioneer of this excellent scheme that will help LGBTQ+ people feel more welcome and able have a greater say in how we operate as an organisation.

"We know that many older LGBTQ+ people have experienced decades of discrimination and that making a decision to live at an historic almshouse organisation like ours can be daunting.

"We are an inclusive forward-thinking organisation that wants to better represent and reflect our community and the pledge will help us work towards achieving this aspiration.

"We look forward to sharing more information in the coming year about the work we will undertake to achieve the three commitments."

David Healey, Chief Executive  
Sir Josiah Mason Trust, Solihull



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KG KT GCB

### VICE PATRON

HRH The Duke of Gloucester,  
KG GCVO

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## Mayor presents Patron's Award

The Mayor of Solihull, Cllr. Stuart Davis, visited The Davenport Homes in Solihull in June to unveil the Patron's Award presented to the Trust for their new development of 12 cottages. He was shown around one of the new cottages and was very impressed with how spacious and airy they were and how well they blended in with the original cottages, which date back to 1935. The Mayor enjoyed afternoon tea with the residents, trustees, staff and architects who were all involved in the project throughout. [Julie Grenfell Property Manager](#)



Chairman of Trustees, David Corney with the Mayor of Solihull, Cllr. Stuart Davis.

## Survey attracts wealth of data to aid longevity research

In the Spring 2019 Gazette, I wrote a brief article to request your help. I have been delighted with the response and am writing now, not only to thank you, but to provide an update on the project.

The aim of the project was to see if we can replicate some research that was carried out in 2017 with data from nearly 100 years of Whiteley Village almshouses in Surrey. The data held were the historic



records of deceased residents: their date of birth and death, gender, the date they moved into Whiteley Village, and the date and reason they left (if they left before they died). From this, the academics at Cass Business School concluded that female Whiteley Village residents have tended to live longer than the national

average. Indeed, the women entering the village in the 1960s lived nearly five years longer than the national average, which is an astonishing achievement!

Although the research found that male Whiteley Village residents only tended to live for as long as the national average this is in itself a notable achievement as it suggests that living in Whiteley Village removes the life expectancy inequality that usually separates the financially advantaged from the disadvantaged.

### Further analysis

The survey that came to you in April was to enable us to find out how many Association members hold similar data about their residents so that we could consider the viability of repeating the analyses with data from multiple almshouses. This would considerably strengthen the research and may enable us to strengthen our hypotheses for why people live longer in almshouses (or perhaps don't in some cases).

I was pleased and thankful that so many of you took the time to complete the survey, either in paper format, or online. Thank you so much! I received 215 responses and, of these, 48 separate almshouse charities have data that should be compatible with the types of analy-

ses we want to do. Not all these charities have data that is complete enough but if we include records that we think are viable into the analyses, it will take the total number of records from Whiteley's 2,614 to over 10,000. In addition, the years covered by the analysis would increase from almost 100 to possibly 189 years.

It is humbling to consider the data held in some of the most beautiful and historically significant buildings in the country. Buildings that have, in many cases for centuries, offered a refuge to the most vulnerable in society. The data held, in all its forms, differences, and varieties can offer to the modern almshouse supporters tangible and quantifiable evidence of a benefit of almshouse living.

### Housing solution

If it shows that across a range of almshouse settings, structures and geographies, longevity has been historically increased compared to the equivalent socio-economic group in the general population, then this can open the door for almshouses to, even more, take their right and proper place in modern society as places offering a housing solution that increases life expectancy.

It would also open the door to a greater exploration of what precisely creates that longevity gain.

I will continue to keep you updated over the coming months as we explore what it will take to collect the data from the 48 charities and, if you are one of the 48, we will hope to be in touch soon!

**Dr Alison Armstrong**  
Foundation Director, The  
Whiteley Foundation  
for Ageing Well



All data will be securely handled in accordance with GDPR 2018 and the ethical guidelines followed by academics undertaking research. For the full report see [whiteleyvillage.org.uk](http://whiteleyvillage.org.uk)

## 2020 calendar dates

<b>MARCH</b>		
Wed 4	Trustee & Clerks Induction Seminar	Rochester
<b>APRIL</b>		
tbc	Trustees & Clerks Seminar	Worcester
<b>JUNE</b>		
Thurs 4	Members Day Conference	London
Tues 30	Trustees & Clerks Seminar	Hull
<b>SEPTEMBER</b>		
tbc	Scheme Managers/Wardens Seminar	Bedford
<b>OCTOBER</b>		
Tues 6	Trustees & Clerks Seminar	London