



# the almshouses Gazette

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## Independent living in energy efficient homes

Girton Town Charity in Cambridgeshire celebrated a major milestone in December with its latest building project to create 15 almshouses for the over 55s and a new office for its own operations. The charity joined with contractor Barnes Construction, Mole Architects and Northmores Project Managers to mark a key stage in the building programme at Dovehouse Court, with the erection of timber frame panels which will provide the structure for the new energy efficient homes.

Built to stringent Passivhaus standards, Dovehouse Court has been designed to meet the future needs of

older people to enable extended independent living,

including easy wheelchair access. The homes will have individual terraces or balconies, opening onto communal landscaped gardens, an orchard and allotments.



**Marking a milestone at Dovehouse Court (left to right): Jamie Saunders, Director, Northmores; Mark Hart, Joint Managing Director, Barnes Construction; Ian Bramwell, Senior Associate, Mole Architects; Ann Bonnett, Chair Girton Town Charity and Matthew Ramplin, Contracts Manager, Barnes Construction.**

Passivhaus is a leading international low-energy design standard which offers a robust and proven method to help UK construction achieve carbon reduction targets

set out by the Government and local authorities, leading to a sustainable future for the environment locally, nationally and globally.

The timber frame panels are made from spruce soft wood sourced from Scandinavia and manufactured in Welshpool by Lowfield Timber which specialises in Passivhaus buildings. The frames were delivered to site for erection by crane and, once completed, an air test will calculate the building's air permeability.

This project, scheduled for completion in autumn 2022, has recently been awarded a grant from The Cambridgeshire & Peterborough Combined Authority, with the balance funded by the charity.

Ann Bonnett, Chair said: "We are committed to providing homes that will meet the needs of our residents, both families and the over 55s. With Dovehouse Court, we are looking forward to having age-appropriate affordable almshouses that are not only practical and energy efficient but also enjoyable places to live. We are delighted to mark the installation of the timber frames which are an important milestone in the 61-week programme."

## Celebrations begin for Royal Jubilee



On February 6 this year Her Majesty The Queen became the first British Monarch to celebrate a Platinum Jubilee, marking 70 years of service to the people of the United Kingdom, the Realms and the Commonwealth. To celebrate this unprecedented anniversary, events and initiatives are taking place throughout the year, culminating in a four-day bank holiday weekend from Thursday to Sunday, June 2-5.

The bank holiday will provide an opportunity for communities and people throughout the UK to come

together to celebrate this historic event with public events and community activities, as well as national moments of reflection on The Queen's 70 years of service. In addition, initiatives including The Queen's Green Canopy ([www.queensgreencanopy.org](http://www.queensgreencanopy.org)) will create a lasting reminder of the Jubilee, while The Queen's private estates will also join in with special themed events offering members of the public an opportunity to celebrate this historic milestone.

Many almshouses are also planning celebrations - see page 9.

## CHIEF EXECUTIVE'S COMMENT

### Charity, trustees and strength of small scale

There are no charities without trustees. The foundations of the almshouse movement are built on its charity status and thrive on the commitment of trustees. The protection and longevity which the charity status provides to almshouses is not to be underestimated. Anecdotally, when I have spoken to historians about the demise of almshouses across Europe, they have all mentioned the part "the state" has played in the ownership,

### Helping charities file returns

Members may be aware that the Regulator of Social Housing recently released a list of Registered Providers who had failed to submit their annual returns in a timely manner. This list included a number of almshouse charities and was subsequently published by Inside Housing magazine. This story highlights the need for trustees to ensure they have completed all their regulatory duties accurately and in a timely manner. The Association has reached out to the charities mentioned and found that with earlier Association involvement, this situation could have been avoided.

We know that trustees sometimes find themselves in situations where managing their charity can prove tricky, especially during the pandemic. In times like these it is important to remember that the Association is here to help you find a resolution before it escalates further. You are not alone in finding some of the processes daunting - do give us a call and let's talk it through.

control and eventual dismantling of almshouse networks. This demise, it seems, has not resulted from a lack of need for affordable housing or, indeed, old buildings being too expensive to manage; it seems failure has been more about a lack of regard for the value of independent charity status. Maybe other countries don't hold as dear the charity status as does the UK?

From our research, the early feedback about how almshouse charities responded to the pandemic points to quick responses led by clear plans. We are finding out more information and gaining evidence but this appears to be one of the strengths of small scale charities, helped by leadership close to the beneficiary, accountability and making informed independent decisions for the good of the residents.

### The strength of charity!

Some almshouses greatly benefit from state support in the form of grants and this cannot be overlooked. Many new developments would not be possible without it. But can the charity status be protected? It is tempting to think there may be a middle ground but I doubt it. The state is often a controlling and unforgiving master and I am not sure our iconic historic buildings would be protected as almshouses under some state ownership. Our antiquated founders' wishes and wonderful local trustees make the difference to residents' lives. I feel that protecting the almshouse movement is partly about protecting the charity and founder's wishes, partly about protecting the historic buildings and partly about



helping trustees cover their responsibilities. So, with the pandemic easing, the team here will be responding to requests for visits and meeting trustees. If you have asked for one of our 'Health Check' visits, we are booking more now and we will get to you as soon as possible - thanks for being patient. We are really looking forward to seeing you. Long live the charity status of almshouses; it is where its resilience lies.

Nick Phillips, Chief Executive

## When is a duck not a duck?



When is a duck not a duck? When is an almshouse not an almshouse? No, it's not a seasonal joke! If it is, it's not a great one because the punch line is somewhat depressing. In January we became aware of a number of almshouse charities that have found out their status as an almshouse is genuinely at risk, not the buildings, not even the loss of a trustee, but at risk through management and governing documents. An almshouse has a definition. It is a definition that gives the housing model its legal robustness and a defence against such policies as Right to Buy. That definition includes the licence, the Letter of Appointment, the Weekly Maintenance Contribution and the term "almshouse" in the governing documents. I am raising this issue because the integrity of the charity is based on a

mixture of documentation as well as the founder's intention and the way in which the charity is managed. If we get one of these aspects wrong, or assume it will be just okay, the charity is at risk. There are times when this issue becomes particularly critical. When amending the governing documents, forming mergers or when changing status from a charity trust to a CIO, if one is not careful, it is easy to lose sight of both the founder's original wishes and the status of the almshouse charity. Sadly, it is not always possible to rely on a solicitor to understand the importance of the almshouse integrity and we have even found some solicitors recommending Assured Shorthold Tenancies! A simple check of the governing documents will show the founder's intentions, the beneficiary group identified and the term "almshouse" should appear.

So what is the risk? Why am I and the team so concerned about the "status" of almshouses? Surely, if it walks like a duck, quacks like a duck, etc., etc. Well, we are worried because if challenged in court, eg. by a resident whose Letter of Appointment is set aside, the court will need to know the legal status of the charity. If the resident is issued with an Assured Shorthold Tenancy it will open up huge issues that one can be sure will be expensive to overcome. If the charity is not using the language of "Weekly Maintenance Contribution", "Letter of Appointment" or have "almshouse" written in their documents, the status is likely to be challenged. Furthermore, if one charity status is unravelled it could affect the status of all 1,600+ almshouse charities.

Sorry, no punch line. But if when you look at your processes or documentation you feel the almshouse status is not consistent or clear, let's talk.

## Members views influence Social Housing White Paper

The Regulator of Social Housing has been consulting on a new set of tenant satisfaction measures, as proposed in the Government's Social Housing White Paper.

Published in November 2020, the Social Housing White Paper outlines what social housing residents should expect from their housing provider. The consultation was open until 3 March 2022.

The regulator sought views on its proposed 22 tenant satisfaction measures across the five themes from the white paper:

- Keeping properties in good repair.
- Maintaining building safety.
- Effective complaints handling.



- Respectful and helpful tenant management.
- Responsible neighbourhood management.

Twelve were measured using a perception survey, with the remaining 10 being measured using housing providers' management information. This could include complaints handling, building safety, neighbourhood management, repairs and stock quality information. The Regulator states that they are keen to recognise

"proportionality" and there are a range of variations included in the consultation for Registered Providers with less than 1,000 units. That is most of our members (see Section 11 of the consultation).

Having asked for input from members, The Almshouse Association has responded on behalf of our members and will keep them informed throughout. It should be noted that these proposals only affect those members which are Registered Providers of Social Housing. The Almshouse Association regularly meets with the Regulator of Social Housing to discuss matters in relation to our members.

## Make your project a successful reality

**1. Fit for the future:** Before starting a project consider how it fits with the charity's long-term plan. Almshouses are here for the long-term so consider if the project would still be worthwhile in 20+ years' time.

**2. Vision:** Set a clear vision of what you would like to achieve. Be able to articulate the benefits the project brings to residents. Be able to articulate the "case" - projects are more likely to fail if you don't have a clear goal!

**3. See the risks:** Think of all the reasons why the project will not work, eg. is it too elaborate? not elaborate enough? Can these risks and challenges be overcome or at least mitigated? Being able to respond to these questions will help you deal positively with those who challenge the concept.

**4. Consider project stakeholders and get team buy-in:** Planners and Historic Buildings officers, of course. But there is no point in developing a project if the rest of the board, stakeholders, or in some cases neighbours, are not committed or at least supportive. All building or refurbishment projects face obstacles and if there is uncertainty at board level before you start it may not succeed. Remember, if your project affects anyone else - noise, deliveries, change of view, etc. - get their support early.

**5. Risk management:** Who/what else could upset the apple cart? It is worth thinking about who or what could delay or prevent your project from reaching completion. Is someone not invested in the project or opposed to it? Consider how they could derail the project. Do you need to spend more time with them? Can you mitigate their influence? It is best to approach all parties again before instructing the work.

### Top tips from members who have recently completed projects

**6. Good brief and specification:** Spend time drafting a clear brief and specification, going into as much detail as you can. For example, the height, style and material of skirting board.

**7. Budget:** It is rare for a project to be completed within budget, particularly today. Be realistic - materials and labour are more expensive than ever. Get at least three quotes. Take time to cost everything into the project and create a cost-analysis and budget.

**8. Contingency:** Prepare for the unknown! A contingency is not just a safety blanket, it is expected that you will uncover some unplanned expenses, particularly when dealing with listed or old buildings. The contingency must be part of the costs from the outset.

**9. Plan:** Create a plan, set milestones and timelines. How are you going to get the project from start to finish? Who needs to be involved at each stage and how long will each stage take? Share what you can with those affected and keep them in the loop with changes. There will be delays!

**10. Monitoring and control:** At each stage of the project check progress against your plan and budget. Make any necessary changes and communicate these to your stakeholders.

**11. Project close and evaluation:** Assess the success of the project, document the outcomes and discuss feedback with all those involved. What went well and what would you do differently next time? This will help you in future projects!

**12. In 20 years' time:** Revisit the project and say ... I did that! The residents will be delighted you did.

## CONTENTS

**2/3** Chief Executive's comment; Members views influence Social Housing White Paper; Top tips from members who have recently completed projects

**4/5** Reviewing induction training for charities; AGM in Wolverhampton; Guest speakers and panel experts provide advice at Members Day 2022

**6/7** Almshouse developments: Historic building in Harrogate; Restoration in Edgware; Pendle town centre scheme; Dorset conversion; Affordable homes in Retford

**8/9** Insight into fire safety regulations; New phone technology may affect residents' alarms; Celebrations begin to mark HM The Queen's Platinum Jubilee

**10/11** Energy: balancing the growing demands of decarbonisation; reducing cost of heating in older homes; Installing double glazing in a listed building

**12/13** National News Insight: levelling up, health and the environment; National news spreads recognition of almshouses; Challenges of being a trustee

**14/15** Sculptor creates bust of founder; Presentations mark long service in Northampton, Colchester, Sutton Coldfield and Bedford; Fish and chip lunch in Dorchester

**16** Almshouse photographic competition winners unveil commemorative garden sundial; Opportunities and challenges of reclaiming VAT on building projects

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# Reviewing induction training for charity trustees

**A** Charities exist to create a better society. The range and scope of their work and the variety of people involved as well as those they help is life-changing and enhancing for thousands of people. Trustees have a remarkable history of driving social change and, in the case of the almshouse movement, this has been a constant over centuries. Almshouse charities are a mix of philanthropy, trustee dedication and compassion.

## Role of the Trustee

"Charity trustees are the people who serve on the governing body of a charity. They may be known as Trustees, Directors, Board Members, Governors, or Committee Members. Charity Trustees are responsible for the general control and management of the administration of the charity." ('The Essential Trustee', The Charity Commission)

## The Induction Process

Your new trustee has been chosen for their skills, interest and enthusiasm. This is not about friendship but perhaps a spirit of collective ambition to see good things happen at the charity. Most charities' induction process is not thought of in such formal terms; it's often a matter of overlaying information about the charity, how it functions, its shared values, the roles of individuals and some of its history. Nonetheless, it is advisable for the chair of trustees or the clerk to hold a checklist. It is time well spent to ensure new trustees feel welcome, have an understanding of the charity, know what is required at the outset and the term of office ahead. Below is a suggested list:

- **A historical summary of the founder and the charity:** Most charities, no matter how small, usually have a short sketch history of the charity. The new trustee will welcome such background information.

## ● Governing Document:

This is the legal document setting out the charity's objects or purposes and, usually, how it is to be administered. It may be a trust deed, constitution, memorandum and articles of association, conveyance, will, Royal Charter, Scheme of the Commission or other formal document. It will probably be a dry legal document but it is the charity's main constitutional document and needs to be read and understood. If it is not clear, the chairman or clerk should explain it further. If, as in the majority of cases, it is a Scheme of the Charity Commission, the term of office of the trustee will be clearly defined.

## ● Language of an almshouse charity:

This is an important aspect of an induction, particularly in almshouses. Terms such as resident, licence, handbook, WMC, etc. These terms mark the legal difference between almshouses and other forms of housing and need to be used to avoid confusion.

## ● Last Annual Report and Accounts:

Clearly anyone considering trusteeship will wish to have an appreciation of the financial position of the charity. If this is not clear, the current treasurer should explain matters further. All charity trustees must ensure that its finances are used appropriately, prudently, lawfully and in accordance with its objects.



● **Former Minutes:** In order not to feel out of touch at the first meeting, the new trustee will welcome the opportunity of studying previous minutes. If the charity trustees meet monthly, copies of the previous three months should be provided. If the charity only meets quarterly, copies of the previous 12 months of business should suffice.

● **Policies of the Charity:** The charity will have a number of policies in place. Copies of these should be provided. Policies may include Health & Safety, Abuse, Fire Procedures, Visiting, Disaster Recovery, and Complaints (a non-exhaustive list).

● **Fellow Trustees:** It is very useful for the new trustee to be provided with a list of the existing trustees, their addresses, telephone numbers and emails. A two or three sentence thumbnail sketch of who they are and what they do, or have done, is also suitable background.

● **Programme of Meetings:** In smaller charities this may well only be a list of four or six dates. In medium to larger almshouse charities a programme may encompass sub-committee meetings or standing committee work and familiarisation with this will be essential. Standing committee or sub-committee work may include "property", "residents' activities", "finance" or "fundraising" (a non-exhaustive list).

**Useful information can also be obtained from the sources below:**

- The Almshouse Association Standards of Almshouse Management and Support and Care online manuals available on our website.
- The Trustee Welcome pack inc. 'The Essential Trustee' available on the Government's website at [www.gov.uk/government/publications/charity-trustee-welcome-pack/charity-trustee-welcome-pack](http://www.gov.uk/government/publications/charity-trustee-welcome-pack/charity-trustee-welcome-pack)
- [www.gettingonboard.org/free-resources-for-aspiring-trustees](http://www.gettingonboard.org/free-resources-for-aspiring-trustees)

## The Almshouse Association 2022 AGM

Members and Associate members are invited to The Almshouse Association's 71st Annual General Meeting to be held at Grand Station, Sun Street, Wolverhampton WV10 0BF on Wednesday 15 June 2022 9.45-10am prior to the commencement of Members Day.

The AGM will cover the main business and accounts of The Almshouse Association and is open to all member charities and Associate Members. The nominated representative for each member charity will be invited to cast their vote. One vote per member charity.

- Please confirm your attendance by emailing [admin@almshouses.org](mailto:admin@almshouses.org) (or via post to the address below) with your name and membership number, no later than 16th May 2022.
- If you are unable to attend but wish to place a proxy vote as the representative for your charity, please write with your name and membership number to [admin@almshouses.org](mailto:admin@almshouses.org) (or by post) for a proxy voting form and associated papers, no later than 16th May 2022.

**Note:** There is no charge to attend the AGM, however, AGM attendees wishing to attend the Members Day that takes place after the AGM will be required to purchase tickets using the Members Day booking form on our website at [www.almshouses.org/news/2022-members-day/](http://www.almshouses.org/news/2022-members-day/)  
The Almshouse Association, Member Support, Bilingbear Lodge, Maidenhead Road, Wokingham, Berks RG40 5RU

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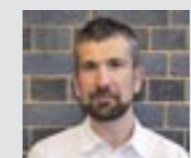
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## SPONSORES AND EXHIBITORS INCLUDE:



We are very pleased to announce that The Almshouse Association 2022 Members Day will take place on Wednesday 15th June 2022 at the Grand Station in Wolverhampton

- Special guest speakers and panel experts including Roland Karthaus (Architecture Matters), Tim Rutherford (Stone King LLP), Lisa Watson-Cook (Lester Aldridge), Adrian Nisbet (Argonaut HR) and Tim Richardson (Quinquennial Inspections)
- Workshops on Governing Documents, Green Energy, Attracting New Trustees, Mediation and Dealing with Challenging Residents
- The Almshouse Association Awards - presenting to recipients of The Patron's Award, The Almshouse Association Award for Excellence and Inspiration and The Gardens and People Award
- Networking
- Q & A with Panel of Experts
- Exhibition stands include Charity Bank, Higos and Ecclesiastical insurance services, HCR solicitors, CCLA investment management, Moore Barlow lawyers, Waverton investment management, Grout insurance brokers, Argonaut HR and Fifield Glyn chartered surveyors
- Refreshments and lunch

To book your place, please visit our website at <https://www.almshouses.org/news/2022-members-day/>

**Come and discuss the almshouse movement, its past and future!**

**NOTE:** Our 71st AGM will be held at the same venue on 15th June, taking place before Members Day starts.

## Three new homes in historic building

*Graham Chamber of the Harrogate Advertiser writes*

The rare opening of a new almshouse for those in need over 60 in one of Harrogate's most beautiful and highly prized Victorian squares was marked by a day of celebration. For most of the 150 years since

additional almshouses are being made available. As well as the Harrogate Mayor, Trevor Chapman and Deputy Mayor, Christine Willoughby, the opening ceremony was attended by representatives from Homes England and The Almshouse Association. Guests were entertained by schoolchildren from St Peter's School across the road who traditionally support residents of the almshouses at Christmas by carol singing and presenting gifts. Located in a Grade II listed building built in 1868, with a clock tower decorated with a bust of George Rogers, the newest almshouse was created by converting an old laundry into a new dwelling. Two other houses have been completely refurbished and welcomed three new residents.

To mark 150 years of since George Rogers set up the charity in 1868, the front gardens were totally relaid, grass removed and replaced with plants, winning the 2018 Harrogate in Bloom McArdle trophy for 'best new garden'. In 2019 the garden won an Almshouse Association award for the work to link the garden with the community.

Bradford mill owner George Rogers first gifted this unique form of low-cost social charity housing to the town's needy, only 12 properties have stood at the heart of historic Rogers Square with its award-winning gardens and summer tea parties. But now, thanks to a grant from Homes England and funding from the Rogers' Almshouse Charity, three

## Distinctive stone pinnacles restored

Seven years short of its 200th birthday, Days Almshouse in Edgware, North London has had a makeover. Over the years, the climate and pollution have taken their toll on the exterior, particularly the eight decorative Bath stone pinnacles which are a distinct feature of this beautiful building. Research into the building's past revealed the quarry from where the original stone came and allowed a

perfect match to be achieved by replacing the corroded areas with new stonework, in the hope that it will continue to enhance the accommodation for the next 200 years. Constructed in 1828, the almshouse was gifted by Charles Day, the British industrialist who was co-founder and then sole proprietor of the Day and Martin boot polish company.



## Problems solved to make new flats

We were pleased to hear that Daniel Taylor Almshouse Charity in Dorset has been granted planning permission for the conversion of an old day centre into eight almshouse flats. The charity has served the people of Bridport for hundreds of years and has been looking to expand its ability to provide genuinely affordable homes to those in need. The Almshouse Association was delighted to see a positive outcome after assisting the charity in discussions with the local council around some initial questions over the project. Thanks to the determination of the charity, in



particular clerk David Partridge, they were able to overcome the early concerns and have now secured eight new, genuinely affordable homes in perpetuity. As well as providing affordable homes, the flats will also be highly energy efficient with the use of solar panels and heat pumps throughout. When discussing his motivation for pursuing the project, David Partridge said: "Later on in life I became involved in almshouses and I have also developed some skills in building and project management. I have project managed a few of my own projects together with improving the insulation on an existing almshouse property. Each job was more difficult than the last but I'm not good at being bored and I am hoping for a glorious sense of achievement when this is done." We all look forward to seeing the completed conversion.

## Affordable homes planned on site of former petrol station



Trinity Hospital Foundation, a Nottinghamshire based charity, has agreed a deal to take ownership of a petrol station and retail space in Retford. The four-unit site will be used to support the charity's work in providing genuinely affordable accommodation in the local area. The charity has had links with the community for over 300 years and provides accommodation for elderly men. This is a significant project which highlights the entrepreneurial spirit of the almshouse trustees who seek to secure their charity's income for the future. In doing so, they will ensure that provision of almshouses can continue in perpetuity.

## Enterprising development creates new almshouse flats

The Peter Birtwistle Trust has added twelve new almshouse flats to the existing 83 properties owned and managed by the charity in Colne, Lancashire. The trust was approached by Pendle Borough Council in 2019 to purchase a long lease on a town centre development being built by Pendle Enterprise and Regeneration Limited (PEARL), a joint venture company formed by the Council and Barnfield Construction Ltd.

### Housing grants

With the assistance of Sean Stafford and Sue Missin at Saffer Cooper, a Community Housing Fund grant was secured together with a capital grant from the Homes England Affordable Housing Programme.



With planning permission already in place and having worked with Pendle Enterprise and Regeneration Limited on a previous new build scheme, the trustees pushed ahead with the first purpose-built block of flats in the charity's property portfolio. The 12 one and two-bedroom flats were completed in August 2021 and are already fully occupied. Peter Birtwistle House is situated at the heart of Colne town centre with

easy access to local shops and amenities. The development includes a pedestrianised courtyard outside the front entrance and parking spaces to the rear of the property, with an electric vehicle charger for the use of the residents. Inside is a secure store suitable for mobility scooters, powered wheelchairs and electric bicycles. Five of the flats have their own terrace areas and a communal terrace serves the remainder of the properties. When planning the development, the trustees were keen to provide accom-



modation which was designed to meet the varying needs of its residents, both now and in the future. Using the services of JDA Architects, HAPPI Principles were incorporated into the project. The building complies with Category 2 Accessibility requirements. Clear internal and external signage together with distinctive colour schemes on each floor help residents with wayfinding. Open plan living areas and wide hallways enable free circulation around the properties. Two of the flats have been designed for use by wheelchair users. These include a wet room and kitchen with

lowered hob, sink and worktop. Two spacious bedrooms provide accommodation for residents and their carers.

### Low carbon heating

To embrace the reduced impact of low carbon heating systems, the property is heated by electric radiators. Solar panels on the roof of the building provide power to the communal areas which has resulted in a lower service charge for the flats than would otherwise have been the case. New resident, Robert Anderson said: "Peter Birtwistle House is a wonderful place to live. We believe that the trustees have thought of everything when designing the flats and we could not be happier or more settled". Chairman of the Trust, Alan Davies said: "This is the second £1.5 million development the trust has undertaken in the last five years and its success has only given us an appetite for more. We are delighted with how well it has been received. The Homes England grant, some of our own money and a loan from the local council have made this possible. I look forward to being able to cooperate in a similar manner soon for yet another scheme."

Peter Birtwistle was born in Colne and emigrated to Canada in the 19th Century. In 1918 he created a Trust leaving his fortune to the Borough. The first 22 almshouses were built at Peter Birtwistle Close in 1957, with a further 18 at Birtwistle Fold in 1964 and 10 more at Birtwistle Standroyd in 1970. In 1993 the Trust became a Housing Association and built 10 flats and four bungalows at Birtwistle Hyde Park.

# A brief insight into fire safety regulations

The Regulatory Reform (Fire Safety) Order 2005 legislation applies specifically to England & Wales.

Scotland, Northern Ireland and the Channel Islands, including the Isle of Man, have their own equivalent legislation. Enforcement for this legislation is mainly carried out by the local Fire Service.

On the 1st October 2006 the UK Government changed the fire safety legislation in line with the European Directives where the onus of compliance for fire safety is placed on the Responsible Person for the premises. The individual, if competent to do so, should carry out their own assessment of the property and ensure their premises are compliant with the Fire Safety order, which is a legal requirement.

## Responsible Person

The Fire Safety Order applies to any almshouse properties including temporary residential and non-residential structures. A trustee of the charity with a degree of building management may take on this role. All trustees will be seen as being the 'Responsible Person' under their management of the charity.

There is an exclusion in the legislation relating to the residential use of almshouses known as 'domestic premises'. A domestic premises means 'premises occupied as a private dwelling or other appurtenances of such premises which are not used in common by the occupants of more than one such dwelling'.

It is common, of course, for an individual almshouse to be occupied by one or two persons. This will mean the individual residential

accommodation inside each dwelling but it does not relate to the communal access staircases and landings. Other communal accommodation not considered to be excluded will be the residents' use of the laundry room(s), recreational rooms, offices and the refuse bin stores if inside.

Many almshouses will be of the single storey terrace-type, with each resident having their own front and rear doors opening directly to outside. This exclusion will also apply to semi or detached 'bungalow type' buildings. Determining whether a property is provided with an adequate level of fire safety to protect persons using the property is based upon a 'Suitable and Sufficient' fire risk assessment being undertaken by persons considered to be competent to assess the risk(s). A fire risk assessment should follow the five steps set out in the published guidance.

Many residents tend to be elderly, some with mobility issues, who cannot 'self-evacuate'. The assessor should ensure that adequate arrangements are in place for their safety in the event of the need to evacuate the building.

The legislation specifically states that the fire risk assessment should be reviewed regularly, at least once a year, to account for any material changes that may have occurred. An area that the Fire Service is keen to check, even in the case of small properties that may not require a specific fire risk assessment, is whether properties with communal roof spaces extending over several occupancies have been structurally separated to create fire breaks up to the underside of the roof covering.



by HARRY PAVIOUR,  
Almshouse Association Panel  
Consultant

If trustees are concerned about the internal layout of a particular resident's accommodation, this is a matter for the local Council's Housing Department and not the fire risk assessor. If a charity engages the services of an outside assessor, they should satisfy themselves that the assessor has knowledge and experience of almshouses.

## Duty of care

'Duty of care' in almshouse occupancy is not specific to fire safety yet it does apply to other responsibilities that the charity must address.

Relating to fire, specifically it should cover the services to the buildings that provide heating and lighting, cooking appliances, curtains and fabrics, furniture and portable appliances brought in by residents.

A charity with almshouses that are listed buildings should work closely with the local council's Historic Buildings Department before any alterations are made to the fabric of the building, whether internally or externally.

# Celebrations begin to mark Her Majesty The Queen's Platinum Jubilee year



To celebrate HM The Queen's 70 years of service, many events and initiatives are taking place throughout the country during the year, culminating in a four-day bank holiday weekend from Thursday to Sunday, June 2-5. We know many almshouse charities are planning local events and a few which have taken place already! Whatever your plans, we would love to hear about them. Please send your stories and photos to [karenmorris@almshouses.org](mailto:karenmorris@almshouses.org)

The Royal Family website at [www.royal.uk/platinum-jubilee-central-weekend](http://www.royal.uk/platinum-jubilee-central-weekend) is full of ideas on how to get involved.

## New Barnstaple garden joins 'Plant a tree for the Jubilee' scheme ...

Barnstaple Almshouses were delighted to plant the first Queen's Green Canopy tree in Devon, at Penrose Almshouses, to commemorate the Platinum Jubilee and to officially open the new gardens.

Residents, families, friends, trustees and guests rejoiced in being able to get together again after Covid for the opening of the new gardens by Lady Arran VLL, MBE and tree planting by Lord Teverson, Ambassador for The Almshouse

## ... another in Rutland



A few hardy souls braved the 'challenging' weather conditions with very high winds to join the Lord-Lieutenant of Rutland, Sarah Furness, and the Chairman of St John and St Anne Almshouse Charity, David Patterson, when they planted a winter cherry tree in the grounds of St Anne's Close. The charity is believed to be the first in Oakham to 'plant a tree for the jubilee', a sustainable initiative created to mark the Platinum Jubilee year.

In Rutland, it is hoped to plant as many trees as there are people living in the county.

Association. The Penrose Crab Apple tree is now marked with a pin on the Queen's Green Canopy interactive map, which shows all the trees which have been planted in the UK as part of the project.

The trustees of Dunk's Almshouse Charity, Kent have decided to hold a lunch-time barbecue for residents over the long bank holiday weekend. One of the resident's daughters is already busy making bunting for the garden and Clerk, Lisa Panting is preparing her camera ...

Chairman Mike Ford said: "It is a pleasure to provide this garden for residents and we all hope they gain much enjoyment from them".

The new gardens provide a mixture of large allotments, a communal allotment area with summer house and tool shed, together with three lawned areas for either quiet reflection or larger parties. Vegetables are

prolific in the allotment plots, whilst passion flowers, scented roses and clematis adorn drooping ropes, trellis and two pergolas.

The backdrop of shrubs and flowers has been carefully designed to provide all year round interest and perfume.

Lady Arran planted a plum tree in the grounds, donated by the mayor and unveiled a commemorative plaque. She said: "Penrose is a sanctuary in Barnstaple and has the most extraordinary spiritual feel. This new garden really is just the icing on the cake. I cannot congratulate you all enough."



## ... and one more at More's Meadow, Shelford

The trustees of Great Shelford Parochial Charities in Shelford, Cambs were very pleased to receive just over £2,000 from Shelford Co-op's Local Community Fund. The money will be spent on further improvements to their community garden and orchard, in particular on native trees and shrubs, as well as a new bench. There are also plans to establish a bird meadow to provide a seed and insect-rich habitat, as well as bird boxes and possibly even a swift tower.

Trustees Keith Sugden, Simon Talbott and Michael Pooles of Great Shelford Parochial Charities are pictured planting an oak sapling on More's Meadow.



## New phone technology may affect residents' alarms

With the digital telephone switchover fast approaching, it is important to think ahead. Analogue phone networks rely on physical components like copper wires to carry voice signals between users - this system is known as PSTN.

The worldwide network is now almost entirely digital (known as ISDN) and only the oldest sections still use analogue technology. However, they still use the old PSTN circuits and the network is struggling to keep up. So, to meet the growing need, BT plans to retire both PSTN and ISDN by the end of 2025 and use a new technology called VoIP (Voice over Internet Protocol) which allows users to make telephone calls via an internet connection.

If almshouses are still using pull-cord alarms and analogue connections, they will be affected by the switchover which is scheduled for completion by 2025.

But do not worry, you still have time. The process to switch is quick and easy but if you have not already switched your resident alarm systems to the latest technology, it is important you include this in your plans and budgets.

This information has been supplied by Almshouse Association Panel Consultant, Lifeline 24. A more detailed article is available on their website at: [www.lifeline24.co.uk/digital-telephone-switchover/](http://www.lifeline24.co.uk/digital-telephone-switchover/) or for further information contact Lifeline 24, free phone 0800 999 0400, or email at [keyaccounts@lifeline24.co.uk](mailto:keyaccounts@lifeline24.co.uk)



# Balancing the growing demands of decarbonisation

The never-ending rise in energy bills which will be hitting us over the next few months, if not years, is extremely concerning. Running in parallel is the discussion around the needs of our country to decarbonise and become more sustainable. As one of the major contributors of emissions (largely from fossil fuel powered boilers), housing is a great challenge on our road to decarbonisation, so how does the almshouse movement make a fair, green transition to a low carbon world, whilst also maintaining the integrity of the wonderful buildings in our care?

## Variety of technologies

As this process continues, we will all have to become familiar with different technologies including heat pumps, solar panels, home batteries and likely other technology which do not yet exist. There is a split in our country between those who are eager to adopt the green way of life and those who feel that change is being forced upon them too quickly and without enough support. It is a fair argument that government must provide significantly more financial support across the board if we are going to be able to meet this challenge. We must also consider that not all our dwellings will necessarily be able to meet the highest energy standards and so we must think about how we deal with these in the long-term.

Almshouse trustees will want to consider how this transition fits within the ideals of almshouse management; there are so many responsibilities to balance. There is a responsibility to provide for those in need and also maintain the buildings to ensure that a genuinely affordable provision of housing is available in perpetuity. We believe the green transition provides an opportunity to live up to these ideals.

We know that we have dwellings which are beautiful examples of historic architecture but are also draughty, damp or heated with fossil fuels. Buildings like this, regardless of their beauty, are unlikely to remain if sympathetic changes are not made to make them suitable homes. We can no longer accept that residents, likely vulnerable, often elderly, can continue to live in homes too cold to be comfortable and too expensive to heat.

At The Almshouse Association, we believe almshouses are the exemplar form of community led housing and, as such, can rise to the occasion and put the needs of residents ahead of concerns of cost. Our movement is a

determined one which, with or without government support, will find inventive ways to play our part in this journey.

The current legislative environment is a minefield of confusion and uncertainty. The Government has made a commitment for the country to be net zero by 2050 with a number of milestones between now and then. On the whole, almshouses operate in a grey area within this legislation. We regularly receive enquiries on EPCs, energy standards, replacing boilers and various government deadlines which make their way into the press. From



the outside, this can be very daunting. The emerging legislation that applies to tenants and leases is not firm enough for the Association to always provide concrete advice for members. However, what is quite clear is that decarbonisation is happening and the necessary changes will need to be made to some extent at some time soon. Our suggestion would be to assess your stock (this could be tied in with your quinquennial surveys) to see what changes can be made. This might include 'quick wins' such as switching to energy efficient light bulbs or installing smart heating systems but will also flag larger investments in windows, insulation and clean heating options. Planning now will allow you to make the necessary WMC adjustments to ensure you remain in a stable financial position. This is vital as, without doubt, this is going to impact your finances.

## Loans and grants

The Association is here to offer support in meeting the challenge where we can. We provide members with interest free loans and grants to support necessary improvements and this will become more important as members seek to make further changes. We are also looking at how we can share information and knowledge on the best ways to retrofit properties, particularly listed and other 'hard-to-treat' dwellings. To gather this information, we are developing a pilot study with our members and a panel of experts to

carry out retrofits on these dwellings, which will create a guide for others in the movement and wider housing sector. In the meantime, we really appreciate case studies from members who have already gone through this process which can then be shared with others.

To ensure that we are offering the best possible service and advice in this area we are working collaboratively with a number of groups including Historic England, the National Trust and the National Housing Federation, as well as our almshouse counterparts in Holland. These partnerships will allow us to better understand everything from air source heat pumps to passivhaus.

## Exciting opportunities

We are only at the start of this journey. It is one which appears daunting but provides a genuinely exciting opportunity for almshouses to provide homes which are warm, secure and less expensive to heat. These changes provide a chance to reduce the long-term running costs of our almshouse charities whilst providing a high standard of living for residents. There will undoubtedly be bumps along the road but the Association is here to help with ambitious plans to show almshouses as leading the way in sympathetic retrofit and high energy standards.

If you have any queries on energy standards or would like to share information on your own green journey, please get in touch with Jack Baldan at [jackbaldan@almshouses.org](mailto:jackbaldan@almshouses.org)

# Seeking to reduce energy costs in older almshouses

Ambitious measures such as insulating solid walls and floors can be expensive, disruptive and, if not properly planned in accordance with a standard such as PAS 2035, lead to potential problems with condensation and mould. Instead look at the simple measures that so often get overlooked.

**1. Insulation** - Cavity walls (when present, large enough and not already insulated) can usually be simply insulated from the outside. Loft insulation can very often be topped up - many almshouses have only 100mm or 150mm loft insulation which can be doubled to 300mm. It is not uncommon for the easily accessible roof spaces to be insulated but less accessible ones (often with no loft hatch or vertical stud walls adjoining loft spaces) have been missed, meaning large parts of the building are completely uninsulated.

**2. Loft hatches** - a large number of loft hatches are a simple sheet of plywood or blockboard without any insulation added. If the rest of the roof is well insulated this is a major heat loss spot and if there's no draughtstripping or hooks or bolts to hold the hatch in place, further heat can be lost through unintended ventilation. Adding insulation to the back of the hatch, draughtstripping and adding hooks and eyelets is quickly done with minimal impact on the residents.

**3. Lighting** - Though not a major user of energy it is surprising how many almshouses have incandescent

The Association sought the advice of Panel Member, Tim Richardson on how members can reduce their energy costs - here are first five things to consider:

light bulbs still fitted; many also have halogen or older fluorescent tubes. Incandescent bulbs started to be banned from 2009 onwards under energy efficiency regulations. Further bans include all halogen lights from Sept 2021



ing lights to LEDs (perhaps as a property becomes empty) is very easy and quick.

**4. Radiators** - A small change which has been shown to be effective in reducing carbon is to place reflective foil (such as Radflek, as approved by the Energy Saving Trust) behind the radiators. This is sometimes added as a DIY measure but could equally be actioned alongside decorating or heating replacements. It has already been implemented by a number of housing associations and councils.

**5. Heating controls** - whilst changing heating systems may have a radical impact, it can be costly and if the current heating system is not that old,

the embodied carbon impact in scrapping something ahead of time should also be considered. Instead look at whether the controls are the

optimum they can possibly be. Do most of the radiators have thermostatic valves (TRVs)? Is there a room thermostat? (Having this as well as TRVs is recommended but in some older systems TRVs alone are fitted.)

Is there a weather compensator fitted which takes into account external temperatures?

Are hot water cylinders well insulated? (Even if they are, adding an extra jacket is cheap and easy.)

Is the hot water cylinder fitted with a thermostat? Smart controls may be a step too far for some residents but these are often linked to apps with additional energy saving functions built in and worth considering for scheme managers' offices and communal facilities.

Some of the above may be obvious, others not, so trustees may want to add a "wishlist" of energy efficiency measures such as this to the brief for your next quinquennial inspection. That way the surveyor will be able to collect the information at little or no extra cost to the charity and the recommendations can be added to the future plans for the building.

For further information see [www.timothyrichardson.co.uk](http://www.timothyrichardson.co.uk)



Latham Almshouses share the challenges they came up against when trying to install double glazing into a listed building and how they were overcome.

The Latham Almshouses date back to 1500 and were Grade II listed in August 1972. There are 10 terraced houses, eight with one bedroom and two with two bedrooms, providing homes for older people and people with disabilities. In May 2019, the trustees decided that they would replace all the front windows, which were in poor condition and single glazed, with new double glazed units as recommended in the quinquennial inspection 2018 report. Clerk, Stuart Cunningham

## Successful installation of double glazing in a listed building

obtained specifications from a number of manufacturers who supplied hardwood windows with sliding sash windows. He also arranged a meeting on site with a council building inspector to discuss the new windows.

In Oct 2019 the inspector agreed that the new windows could be double glazed, however, he wanted the middle window to slide. Stuart informed him that all the existing sliding windows were sealed up or broken and an opening middle window was preferable, being easier to open and close for the elderly residents who had reported that they were finding it difficult to use the sliding middle window. Sadly, the building inspector insisted on a sliding middle window.

The Almshouse Association was contacted for help with this issue and

supplied a letter in support of the trustees' revised planning application. Due to Covid-19, no further correspondence was undertaken until mid-2020 when Stuart was informed that the previous building inspector had left and a new one had been appointed. When he met with the new building inspector, he informed Stuart that the new windows could not be double glazed and would have to have secondary glazing retro-fitted! Following this, Stuart met with the trustees and discussed the new building inspector's requirements. It was decided that a company who specialise in planning matters should be appointed to make a revised planning application. Wallis & Co were appointed and submitted a revised application to the

council, along with the letter of support from The Almshouse Association. Planning permission was finally approved in December 2020. Three updated quotes were obtained from local window manufacturers and one was chosen by the trustees in April 2021. One window had to be fitted and approved before the remaining 10 could be installed. This was done and the go ahead given in November 2021 but a shortage of glass in the UK due to Covid-19 delayed the installation. Five windows were eventually installed in December 2021, with the rest due in early 2022, weather permitting!

Thank you to Latham Almshouses for sharing their experiences. If any other almshouses have a story to share with members about overcoming planning/renovation obstacles, please do get in touch.



The Almshouse Association regularly publishes Policy and Governance updates on its website. The text in blue below denotes a web link to a specific document or report which can be accessed via our Policy and Governance web articles at [www.almshouses.org/latest-news/](http://www.almshouses.org/latest-news/)

## Department of Levelling Up, Housing and Communities

- **New building safety measures announced** - The Government has announced a new £4bn fund for 11-18 metre high buildings to cover the costs of remediating unsafe cladding. The fund will be made up of contributions from developers. More information can be found at [www.gov.uk/government/news/government-sets-out-new-plan-to-protect-leaseholders-and-make-industry-pay-for-the-cladding-crisis](http://www.gov.uk/government/news/government-sets-out-new-plan-to-protect-leaseholders-and-make-industry-pay-for-the-cladding-crisis)
- **Commencement of the Fire Safety Act** - The Secretary of State confirmed that the Fire Safety Act will commence shortly. When the act comes into force, it will extend fire safety responsibilities to cover all external walls and common parts, including doors to individual flats, in any multi-occupied building regardless of height.

## Department of Health and Social Care

**Social Care Reform White Paper published** - The Department of Health and Social Care has published its much anticipated White Paper on social care reform [www.gov.uk/government/publications/people-at-the-heart-of-care-adult-social-care-reform-white-paper](http://www.gov.uk/government/publications/people-at-the-heart-of-care-adult-social-care-reform-white-paper)

For almshouses, the most significant section can be found under 'Providing the right care in the right place at the right time'. Due to the role of almshouse charities, we believe that there is significant potential for them to contribute to the Government's ambitions of providing the correct kind of support to those in need. In particular, almshouses are vital in allowing people to remain independent.

The White Paper proposes:

- at least £300m invested in the next three years to connect housing with health and care and driving an increase in supported housing
- £30m Innovative Models of Care Programme to support local systems
- investment in the Care and Support Specialised Housing fund with £210m from 2022 to 2025.

The plan is right to state that every decision about care is about housing and as shown in The Almshouse Association's recent [research report](#), almshouses can play a significant role in maintaining independence and reducing the need for costly care.

## Energy and Environment

**Energy Crisis Support** - The Government has outlined support which will be offered to help offset the steep rise in energy bills. This support comes after Ofgem announced that the cap on energy tariffs will rise by 54% to just under £2,000 a year on average. These steps include:

- all households receiving £200 off their energy bills through a government loan to energy companies. This will be applied to domestic electricity customers from October 2022
- properties in council tax bands A-D will receive a £150 refund in April 2022. Those who pay by direct debit will receive £150 into their bank accounts. Local authorities will also have access to £144m in discretionary funding to assist vulnerable people, individuals on low incomes or those in council tax bands E-H
- eligibility of the warm home discount scheme will be expanded with an additional £10 increase from October 2022 to £150. Those on certain means-tested benefits should qualify for the discount but you should speak to your energy supplier about this.

It is worth remembering that the final cost of energy bills is still calculated on your usage and so it is important to consider where energy efficiency measures could be introduced to help prevent costly bills. Details on the Government's announcement can be found at [www.gov.uk/government/news/millions-to-receive-350-boost-to-help-with-rising-energy-costs](http://www.gov.uk/government/news/millions-to-receive-350-boost-to-help-with-rising-energy-costs)

The Almshouse Association was delighted to see two more articles by Chief Executive Nick Phillips published recently - one for the National Housing Federation and the other for the National Association of Local Councils.

## Rural homes give veterans chance to rebuild their lives



From: Homes England  
Published: 19 January 2022

The Buchanan Trust is creating homes for armed forces veterans, with support from the Government's housing agency Homes England.

Set up in 1918 by Robert Buchanan in memory of his son Alan who died in World War I, the Buchanan Trust has been helping former service personnel

## Almshouses in the news

Both of these articles form part of the Association's plans to improve recognition and understanding of the almshouse movement within local government and the wider housing sector. To view all the external articles published about almshouses over the past year, visit: [www.almshouses.org/news/almshouses-in-the-news/](http://www.almshouses.org/news/almshouses-in-the-news/)

Testament to this increasing awareness within government is a new case study on almshouses for veterans published on the [www.gov.uk](http://www.gov.uk) website.



to re-adjust to civilian life for more than 100 years. In 2018 the trust also became an almshouse provider, offering veterans and their families quality homes and the opportunity to gain skills and experience in the agricultural and construction sectors in rural Herefordshire.

Drew (photo left) is no different. Since leaving the armed forces, the trust has helped him to think about his next steps. He's one of the first residents to move into the trust's new North Farm

site, a redundant farmyard which has been transformed into four new homes with the help of a £152,000 grant from the Government's Affordable Housing Programme.

Designed for people living with physical injuries or reduced mobility, the mixed size accessible bungalows are built around a courtyard with a communal meeting room, creating a sense of community and enabling veterans to support each other as they get used to civilian life.

The site will provide six homes in total, with further plans to convert a milking parlour, dairy, stables and hayloft into two, two-bedroomed

cottages, one with full disabled access. The Almshouse Association is pleased to have been able to award The Buchanan Trust with a loan for the next phase of the project.

As identified by the charity, Help for Heroes, former service personnel are particularly interested in working in the rural, farming and forestry sectors. North Farm is designed to address this, forming part of the Buchanan Trust's wider vision to create a national facility for former servicemen and women to live in a community where they can help each other to recover, learn, grow, and work.

For Drew, it's chance to reflect and start to plan for the future: He said: "I'm grateful for having the chance to rebuild my life since I have come to the Buchanan Trust."

## Uneasy lies the head that wears a trustee hat ...



by Tim Rutherford  
Partner and Head of the Almshouse Team  
at national solicitors, Stone King LLP

Being a trustee of an almshouse charity can be an onerous and responsible job but provided you know your key responsibilities and comply with them, you should be able to get a peaceful night's sleep. The top ten responsibilities (in no particular order) are:

1. Make sure that your charity's activities fall within your objects (as set out in your governing document) and that they are being carried out for the public benefit. The objects of most almshouse charities are restricted either by geography, or age, or some other characteristic of beneficiaries and you need to follow these restrictions.
2. Ask for and read a copy of your charity's governing constitution (which may comprise several documents). Make sure you understand how and

when trustees are appointed, how meetings are convened (including virtual meetings) and how decisions are made (including whether they can be made outside of meetings by email).

3. Understand what your constitution says about residents, how they are appointed, what rules they need to follow and the circumstances in which they can be asked to leave. Check that any residents' handbook is consistent with the rules in the constitution, often they vary!

4. Know when to take professional advice about your legal obligations, which can be extensive. Being a trustee is a voluntary role but that does not mean that you have to struggle on without help. However well meaning, failing to take advice when you need to can often have severe consequences.

5. Always act in your charity's best interests and be alive to potential conflicts of interest. Conflicts of interest are not evil, provided they are properly declared and managed; do not turn a blind eye.

6. Make sure you are managing your resources responsibly. This goes far wider than monitoring the funds, resources include employees, buildings,

your reputation and brand and other intangible assets. It is important to have a proper risk register identifying all of your risks and setting out your plan to manage these risks (eg. treat, transfer, tolerate or terminate each risk). But, above all, make sure you have robust financial systems and controls and that you monitor your ability to continue as a going concern.

7. Act with reasonable care and skill. Consider what skills you bring to the board table and make sure you use them. Whilst this is a voluntary role, bring the same approach and skills as you would to your day job (or previous day job if retired).

8. Be prepared to be accountable both internally and externally. Being asked to explain or justify a decision is not an attack on your skill as a trustee! Remember to always ask the question you think is too silly to ask (there is no such thing as a silly question) and try to avoid a culture of dysfunctional politeness where colleagues feel unable to ask basic questions for fear of appearing stupid. It is often those silly questions that expose something that has been overlooked for years!

9. Engage with your beneficiaries. Whilst most of your residents will be seeking independent living, take time to understand them whilst respecting their boundaries. Be careful, though, not to assume responsibility for their well-being beyond your legal responsibilities.

10. When residents' circumstances change, either due to a change in their fortunes or as a result of their behaviour, make sure you take appropriate steps to protect the charity, its reputation and, more importantly, the other beneficiaries you exist to serve. When it all seems too much, remember the Charity Commission's guidance in CC3: The Essential Trustee: "The Charity Commission expects trustees to take their responsibilities seriously. ... The Commission recognises that most trustees are volunteers who sometimes make honest mistakes. Trustees are not expected to be perfect - they are expected to do their best to comply with their duties. Charity law generally protects trustees who have acted honestly and reasonably." Demonstrating you are complying with your key responsibilities will enable you to rest easy.



## Mayor unveils bust to almshouse founder

Richard Watts Charities celebrated at Watts Almshouses in September with the unveiling of a beautiful new bronze bust of Richard Watts, created by sculptor Lynsey Harrison. Peter Smith, Vice Chairman of the Board, welcomed guests before the bust was unveiled by the Mayor of Medway, Cllr Jan Aldous and blessed by Priest Vicar, Ade Lawal. The event was attended by the Town Crier who gathered all together beautifully.

When sculptor Lynsey Harrison visited The Six Poor Travellers' House in Rochester High Street in 2018 she met Elisabeth, the Custodian and discovered that she had a connection to the house via marriage. Lynsey felt so inspired by her family

connection, Elisabeth's enthusiasm and the whole Richard Watts' story, she volunteered her time to make the bust to be located at The Six Poor Travellers' House. It was a lengthy process. Lynsey donated a huge amount of time meticulously researching, gathering funds from various sources and finally creating the bust which we believe is a close resemblance to the man himself. Lynsey was present for the unveiling, together with friends and family including her mother-in-law, Monica, granddaughter of Alfred and Agnes Vinten, who had once lived in the Poor Travellers' House. Following the formal proceedings, afternoon tea was served.

## Founders' family member retires

The Methodist Homestead Charity trustees in Northampton invited residents and the trustees who had retired during the pandemic to attend an afternoon tea in August to celebrate the retirement of Michael Pearson after 50 years' service as a trustee. Michael had been Chair of the board for 25 years until the summer of 2020. What makes this even more remarkable is that he is the great-grandson of one of the two founding fathers of the Homestead in 1929, local businessmen C J Peace and J W Arnold. When Michael joined the trustees his father, uncle and two cousins were also on the board, marking a long family link from the original vision to his retirement. Michael can be seen (photo above right) in front of a picture of his great-grandfather, with current Chair, Stephen Edmonds who is the great-grandson of J W Arnold. Michael has seen the Homestead change beyond belief over the years

with the addition of eight cottages in the 1970s and, more recently, extensive refurbishment and redevelopment,



while still holding to its original vision to provide "peace at eventide". Michael summed up his thoughts by saying: "As I retire from the trust I would like to thank all the trustees who have given so much time and effort to enable the Homestead to go from strength to strength, the wardens who have given so much care to all the residents and especially to all our residents who have continued a loving Christian spirit in this very special place. I remember with gratitude those

trustees and residents who have passed on, who have all made their contribution to the wonderful institution we have today. Finally, I wish the new team, our residents, and our new warden and site supervisor Sam and Robert, every good wish for the future as we embrace a wider ecumenical remit, whilst keeping the essential Christian ethos that makes the Homestead such a special place. May God continue to bless the work of the Homestead and all those it serves."

## New use for anniversary bunting



A novel way of using The Almshouse Association's 75th anniversary bunting has been found by Bakewell Almshouses! Clerk to the trustees, Mike Hillam, explains: "Since joining in the celebrations for the Association's 75th anniversary, we have taken part in the local church's Christmas tree festival. Our theme was 1946-style, for which we attached paper lanterns, knitted snowmen and fir cones, etc., to our tree, together with some of the publicity material sent to us by the Association. Here's to your next 75 years!"

## Presentation celebrates 25 years

The trustees of Winnocks and Kendalls Almshouse Charity were delighted to present Suzanne Robbins with a gift and flowers to mark her 25 years of service as warden to the Colchester charity. The presentation was held outside the listed almshouses due to



Trustees (from left): Anna Daniell and Pat Sharman, with Suzanne Robbins and Chair, John Enfield.

Covid restrictions and sadly no party could be held!

## Enjoying a fish and chip lunch

The Dorchester Almshouses made the decision to cancel their summer garden party in the summer to minimise the risks to residents but they've since made up for it with a fabulous fish and chip lunch. It went down a real treat!



The 17th century saw the creation of three almshouse charities in Dorchester - Whetstones, Napper's Mite and Chubbs. These were merged between the wars to become Dorchester Municipal Charities.



## Residents tea party follows pandemic

Coinciding with the 75th anniversary of The Almshouse Association last year, Sutton Coldfield Charitable Trust held a special tea party for residents of its 46 almshouses following the lifting of Covid-19 restrictions last autumn. Guests were

treated to afternoon tea, coffee, cakes, sandwiches and music. For some residents it was their first opportunity to see each other in over 18 months. It

was one of three events organised by Almshouse Manager Pamela Johnston, together with wardens Marie and Michael. Trustees also joined Pam at the events, along with Tina Swani, Chief Executive, and trustee Ammo Singh. Pamela Johnston commented: "The residents have greatly missed our regular social gatherings during the past eighteen months and it was a pleasure to organise the tea parties where they could meet and socialise in person,

whilst maintaining sensible protocols. I know they thoroughly enjoyed the events." Christmas hampers were also arranged to spread some cheer among almshouse residents. As 2021 came an end, the trust released its 2020/2021 Annual Review high-



lighting achievements during the year, including awarding £1.1m in grants. The trust plans major spending to maintain and improve almshouses and residents' facilities, as well grants to a wide range of communities throughout Sutton Coldfield. With the release of their Social Needs Review, the trust is looking to gain invaluable insight into Sutton Coldfield's most vulnerable local communities, which will heavily influence their long-term plans.

## Retiring from board

After 30 years service as a trustee, Peggy Groves has retired from the board of the Frederick Ray Charity, Bedford but due to Covid-19, a presentation lunch had to be postponed by 18 months!

To mark her retirement, Peggy is pictured receiving a glass vase from fellow trustees Phoebe Ray, great-granddaughter of the charity's founder, together with Chairman, Chris Ray, grandson of the founder.

In paying tribute to her service, Chris Ray said: "Peggy has been a sage presence over so many years, getting to know all our residents, hosting trustee meetings, chairing the board, and delivering Christmas cards with gratuities from the trustees. Her wisdom and experience will be greatly missed."



THE  
ALMSHOUSE  
ASSOCIATION

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KG KT GCB

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# Photograph winners display sundial

The Association received this cheerful photo from The Matthew Chubbs Almshouses Charity in Crewkerne, Somerset showing the "Official Unveiling of the Sundial". Residents bought the sundial for their common lawn with the



money they won in the Association's 2021 photography competition. Pictured (right) are Sheila Seymour, Clerk to the trustees, Tony Foot, Chair and Ken Cox, resident and 'chief gardener' representing the charity. They met stiff opposition in the competition with some fabulous entries. Congratulations to all participants!



(photo left) the sundial. (far left): the prizewinning photograph.

## Value added tax - opportunities and challenges

by Almshouse Association Panel Consultant Glenn Havenhand and Lorraine Kimpton - Charities VAT Services

VAT continues to be an ever increasing cost to almshouse charities. When almshouses incur VAT, there is usually no mechanism to make a reclaim. Fortunately, there are a number of opportunities where almshouses can reduce their VAT costs, provided they are aware of when the zero-rating and the reduced rate of VAT applies. The following building works are likely to be zero-rated for VAT purposes and it is important for charity trustees and staff to be aware of the scope of acquiring VAT free projects. The expenditure to look out for includes:

- Installation of wet rooms or bathrooms for disabled residents
- Widening of corridors or doorways in almshouse properties
- Construction of ramps
- Widening of a pathway across the almshouse grounds
- Installation of a vertical lift, chair lift or stair lift
- Installation of a warden call system.

VAT zero-rating can also apply to expenditure which is closely connected with the above works, such as repairs, refurbishment or servicing to the lifts, warden call system and works to almshouse bathrooms.

Under the current VAT regulations, charities are able to seek a refund of VAT incorrectly charged for up to four years in arrears. The mechanism for acquiring VAT refunds is to contact the supplier and advise them VAT has been charged on items of expenditure which qualify for the zero-rate or reduced

rate of VAT. And now, here is the challenge. Historically, suppliers were very helpful in seeking to assist their customers and they would either directly adjust their VAT returns to allow them the credit for the VAT incorrectly charged, or they would approach HM Revenue & Customs to confirm the position. Unfortunately, many suppliers in the last couple of years have not been so helpful and have not addressed the request for a refund of VAT.

It is difficult to understand this new stance, especially when the VAT refund is not a cost to the supplier. They receive the VAT refund from HM Revenue & Customs and pass it on to the almshouse charity. Although a little additional bookkeeping is necessary, any conscientious supplier will wish to retain its customers and help.

### Building works

Limited opportunities also exist for almshouse charities when certain building works are undertaken. When any charity changes the number of units within their properties, perhaps by reducing the number of flats within a building, the associated building works could well qualify for the reduced rate of 5% VAT.

If an almshouse charity owns any property which has been empty for over two years and decides to renovate the property, the VAT rate applicable to the work is likely to attract the reduced rate of 5% VAT which is quite a considerable saving.



### Energy saving works

The reduced rate of 5% VAT can also apply to a some energy saving

works but the legislation is more complicated. The energy saving materials that may qualify for the reduced rate when installed by a building contractor include:

- insulation for walls, floors, ceilings, roofs, lofts, water tanks, pipes and other plumbing fittings
- draught stripping for windows and doors
- central heating system controls, including thermostatic radiator valves
- hot water system controls
- solar panels.

The 5% reduced rate of VAT may also apply to grant funded heating equipment as set out below. The type of expenditure included is:

- closed solid fuel fire cassettes
- electric dual immersion water heaters with factory-insulated hot water tanks
- electric storage heaters
- gas fired boilers
- gas room heaters with thermostatic controls
- oil-fired boilers and radiators
- central heating systems
- renewable source heating systems.

The reduced rate only applies to the grant funded portion of the works and, should the charity use its own funds, the work will attract the standard 20% rate of VAT. Hopefully, this article will provide charity trustees and staff with information to assist with reviewing past expenditure which may qualify for the reduced rate or zero-rate of VAT. It may also help with future projects and ensuring the correct approach is taken.

If it is found the standard rate of VAT has been charged on any of the above areas of spending, an opportunity may exist to seek a retrospective refund of VAT. Charities VAT Services offer a free VAT helpline for members of The Almshouse Association. If you require confirmation on whether VAT reliefs exist in connection with any of the expenditure areas highlighted above, please do not hesitate to contact.

## 2022 CALENDAR

4 May	Seminar: Looking after your residents	Salisbury
15 June	The Almshouse Association 2022 AGM	Wolverhampton
15 June	Members Day 2022	Wolverhampton
5 October	Trustees and Clerks Seminar	Nottingham
2 Nov	Trustees and Clerks Seminar	Saffron Walden