



the almshouses Gazette

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King Charles III - Our Royal Patron

May 2024 - Everyone at The Almshouse Association was delighted to receive a letter from The Royal Household to advise us that the review of the Patronages of The late Queen, HRH formerly The Prince of Wales, and HRH formerly The Duchess of Cornwall, was complete. Following their thorough analysis of over a thousand organisations, we were thrilled and honoured to read that His Majesty The King will be retaining his Patronage of The Almshouse Association. We are also very pleased to confirm that our Royal Vice Patron, HRH The Duke of Gloucester will be continuing his Vice Patronage of the Association.

Their support underscores the passion and dedication of our members and their steadfast commitment to providing warm, secure, affordable homes for people in housing need.

Association CEO, Nick Phillips said: "We are honoured and feel privileged to have retained the patronage of His Majesty The King. This is a measure of how highly the work of our 8,000 trustees and clerks across the country is regarded."



Congratulations to our Award winners

The Almshouse Association Awards celebrate the outstanding achievements of our member charities. After visiting the finalists, the Awards Committee has announced the recipients of this year's awards for work completed in 2023. (For full details and project photographs, turn to pages 8/9.)

In the Gardens and People Award category, Sloswicke's Almshouse Charity, Nottinghamshire achieved an award for the conversion of a former joiner's workshop into five new almshouses, and Weston Consolidated Charity, Lincolnshire received the award for building two energy efficient, wheelchair accessible bungalows.

An Innovation for Living Award went to Girton Town Charity, Cambridgeshire for replacing six bungalows, built in the 1930s and 1960s, with 15 new Passivhaus-standard homes. United St Saviour's Charity, Southwark achieved an Inspirational Homes Award for its Appleby Blue social housing development in London (photo left) and for the first time there was a Special Community Award given to The Charterhouse, London for its programme of art workshops and subsequent exhibition encouraging community engagement.



FAQs

Have you visited the Frequently Asked Questions area on our website yet?

We are building a library of some of the more common queries from our members. Current topics include:

- Condensation and Mould
- Deregistration
- Digital Switchover
- EPCs
- Fire Doors
- Hoarding
- Legionella
- Pets
- Section 106
- WMC

Is there another topic you would like to see on the website? Please do contact our Member Services team by calling 01344 452922 or emailing almshousesupport@almshouses.org

To view our FAQs, please log into the [Members area](#) of our website, click on 'Guidance' on the menu bar and you will see 'FAQs' in the dropdown menu.

CHIEF EXECUTIVE'S COMMENT

"A history to shout about!"

Recruiting trustees and raising funds requires something of a sales pitch. Almshouse charities offer certainty, living history and community. I know I am rather stating the obvious, but today the world seems a wee bit uncertain (to say the least) – post Covid, financial uncertainty, Ukraine, the Middle East and let's not even start to think about climate change – so yes, "interesting times!". I recently saw a well-known clothing brand advertising with immense pride that it was founded in 1996. This, to me, seems like only yesterday and I genuinely have clothes from 1996 (not sure they fit anymore). In the almshouse world, 1996 is, literally, yesterday, yet this well-known brand was using its foundation date of 1996 to add credibility, a sense of stability and reassurance, and maybe to capture a sense of nostalgia. Many companies take advantage of, say, over a decade of existence, as a sign of credibility. Almshouse charities are a brand of growing value – they are being talked about more often in the media and we are seeing commercial companies trying to jump on the back of the increasing added value of the almshouse architecture by selling new housing in the 'almshouse style'.

But do we make the most of our history?

Ipsos, the market research organisation, reported that: "68% of people in the UK agreed that there are so many critical problems in the world today we struggle to decide what to focus on. The current polycrisis makes us think (positively) about the past" (*Ipsos Essentials*). Creative brand design company, Bison said: "Building on a sense of nostalgia creates the notion that the brand carries with it values from simpler, more settled times". People know almshouses are old and sometimes this is seen as a negative in the world of new quick fixes, but surely the almshouse heritage should also be seen as a rare asset – a sign of longevity, consistency and success. If only we can get that message right. When we think of the spirit of almshouse charities they are, in many ways, holding the best of a bygone social structure. Creating communities of good neighbours may be how the best small communities worked a thousand years ago. Today, privacy, long working hours, travel by car and Netflix have all reduced interaction with neighbours and created a more individual, insular focus. Houses today are built to keep the prying eyes of

neighbours out, but sadly high fences and big gates also keep out the opportunity for a friendly chat, a passing wave or an invitation to pop in for a cup of tea.

It is important to promote our brand when we are seeking new trustees or funding and perhaps we should make more of the heritage aspect of our charities with stories about the founder, the buildings, past residents or past rituals of the charity. These may attract people who have an interest in history or those that feel engaging with history may help them feel more connected with the past and feel better about the uncertainty of today.

If we protect the archives of the charity, historic pictures and stories and find opportunities to share them in the community, there may be an increased interest from funders and potential trustees.

So let's celebrate the history of our charities, their certainty, relevant history and valuable stable communities.

Nick Phillips, Chief Executive

Training for the Charity Commission



In February, Nick Phillips, CEO and Julian Marczak, Head of Member Services, were invited to run a training session on almshouses for the staff of the Charity Commission. They are an attentive and knowledgeable team and were a pleasure to work with. We guided them through an abridged version of our CPD accredited 'The Almshouse Way' training course and hope that this increased knowledge will benefit all our member charities in the future.

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Working with Charity Bank to promote energy efficiency

We are pleased to be working with Charity Bank to create a two-part video series to focus on enhancing energy efficiency in almshouses. The first video covers the three-step energy efficiency roadmap for modern buildings, while the second will explore a roadmap for listed buildings and pre-1919 properties.



photo: Nick Phillips, CEO and Richard Basnett, of Basnett Associates, filming at Hays Cottages Almshouses, Cheltenham.

We aim to inspire, educate and demystify the energy improvement process. The films will include insights from:

- Richard Basnett BSc (Hons) FRICS, Basnett Associates Limited, Building Surveyors, and Designers.
- Tim Richardson MCIAT MCI0B MSAI MRICS, Chartered Building Surveyor, Chartered Architectural Technologist, and CIAT-Conservation Accredited.
- Almshouse charities that have successfully implemented energy efficiency improvements, including one modern and one listed/historic building. We are hoping to launch the series of videos later in the year.

What we are asking from the new government

Before the General Election on July 4, the Conservative, Labour, Liberal Democrats, Green and Reform parties were all committing to building more houses. The two bigger parties battled over promises but there were still fewer affordable houses being added to the mix than the number of people in housing need.

The Conservative Party put emphasis on increasing general house building, with affordable housing being an element of that (much of this, they hope, will come from the private sector), whilst the Labour Party focused on social housing. Labour showed a greater appetite for increased regulation for housing, over and above that proposed and implemented by the Conservative Government. The LibDems were highlighting the need

for more social housing. The Green Party wanted more social housing but favoured brownfield and refurbishment of existing buildings over building on greenfields. The Reform Party concentrated on planning and legal reforms to remove perceived barriers and pressures on housing.

Now that the next government has been voted in, The Almshouse Association is calling on the Labour Party to help free up the potential of more affordable/ social housing by:

- identifying genuine affordable housing based on affordability, not 80% of market rents
- recognising almshouses in the National Planning Policy Framework as proper affordable housing and releasing section 106 funds
- allowing almshouses to access Homes England funding under an alternative form of accreditation based on charity law and adherence to the Association's Standards of Almshouse Management.

We are calling for this because almshouse charities:

- provide homes that generate financial benefits to the social care and health economy of £1,340 per resident, per year. This equates to £43.2m every year
- generate £56m per annum of value in employed staff and voluntary work
- add value to the lives of residents and even extend the life of residents
- can develop in local rural areas on a small scale
- could have the capacity to build thousands of houses a year – if the state provided an even playing field.



The Association encourages you to consider individually contacting your MP to promote the good work you do. If needed, you will find an MP invitation template letter in [Model Policies and Templates](#) on our website.

You may also want to refer your local MP and councillors to a bespoke information section on our website at: www.almshouses.org/mps-councillors

Questions for your MP

To find your MP, visit www.members.parliament.uk/FindYourMP

Suggested questions for MPs:

1. Do you support almshouses being recognised as proper affordable housing under the National Planning Policy Frame?
2. Do you support almshouses being recognised as "affordable housing" for the purposes of s.106 contributions, housebuilding targets for local councils and infrastructure levy?
3. How are you working to give almshouses equal access to Homes England Development funds and enabling the building of more affordable/social housing?

Considering ways to unlock the potential of an almshouse charity

In the ever-evolving landscape of charitable organisations, almshouse charities are exploring new avenues to enhance their effectiveness and sustainability.

One path gaining momentum is the conversion to a Charitable Incorporated Organisation (CIO). This shift offers benefits such as increased flexibility, strengthened governance and enhanced transparency.

● **Legal and financial flexibility** – The transition to a CIO structure provides almshouse charities with a modern and flexible legal framework. Unlike traditional charitable structures, CIOs have their own legal personality, offering protection to trustees from personal liability. This legal separation ensures that the assets and liabilities of the charity are distinct from those of its individual trustees, mitigating risk and providing a secure legal footing.

Compared to being a fully incorporated company, CIOs benefit from simplified administration and reporting requirements.

Importantly, a CIO is able to enter into contracts in its own name rather than individual trustees having to sign legal contracts in their own personal capacity on behalf of the charity. For example, a CIO can enter into contracts of employment whereas an unincorporated charity will need each trustee to sign the contract in a personal capacity which can expose them to undue personal liability.

● **Improved governance** – One of the key advantages of converting to a CIO is the enhancement of governance structures. CIOs typically operate under a single-tier system, where trustees have clear governance responsibilities.

This streamlined approach fosters clear decision-making processes, ensuring that the charity can respond promptly to emerging challenges and opportunities.

● **Enhanced transparency and accountability** – Transparency and accountability are crucial aspects of successful charitable organisations. CIOs are required to submit annual reports and financial statements to the Charity Commission, promoting transparency in their operations. This accountability not only builds trust

with donors and stakeholders but also ensures that almshouse charities maintain the highest standards of integrity in fulfilling their mission. CIO status affords a charity the benefits of being a company without the need to submit returns to Companies House and the Charity Commission remains the sole regulator.

The public register of charities provides a platform for potential beneficiaries, donors and collaborators to access crucial information about the almshouse charity, fostering a culture of openness and accessibility.

● **Charitable purposes and public benefit** – The CIO structure aligns seamlessly with the charitable purposes of almshouse organisations. By providing affordable and supportive housing to individuals in need, alms-house charities contribute to the public benefit. Converting to a CIO reinforces this commitment to serving the community, as the legal framework is specifically designed to facilitate the pursuit of charitable objectives.

In conclusion, the conversion of almshouse charities to Incorporated Organisations (CIO or simply

Incorporated) offers some advantages for legal clarity, improved governance, transparency, and security for trustees.

This transition can empower charities to operate more efficiently and effectively.

As the philanthropic landscape continues to evolve, embracing the CIO model can ensure that almshouse charities can navigate the challenges of the present while remaining steadfast in their commitment to providing essential housing and support to those in need.

It should be borne in mind that whilst a key advantage of a CIO is to mitigate trustee liability, CIO status will not protect charity trustees who leave themselves open to risk by not following good governance guidance and principles.

Contributed by Aaron Spencer, Partner and Head of Private Clients, Furley Page LLP. www.furleypage.co.uk

Trustees are advised to consider all charity structures including the incorporation of trustees. This will be covered in our next Gazette.

See also the Blandy & Blandy webinar on 'Incorporating your Almshouse Charity' on our website at www.almshouses.org/webinars

Regional Peer Representatives

Our Regional Peer Representatives (RPRs) are a UK-wide volunteer group of experienced almshouse clerks, trustees and wardens who offer local support to member charities. The Association is always available to help our members but we recognise the importance of local, peer-to-peer connections. RPRs can tailor guidance to your needs, as well as introduce you to Association members in your area. If and when needed, they will help guide you to the services offered by the Association. RPRs can be contacted directly via the email addresses listed on our website at www.almshouses.org/regional-champions or we can arrange a call or a face-to-face meeting for you.

We are delighted to welcome Mike Seaman as our latest Regional Peer Representative for North London and interim Representative for Kent.

Before joining Day's and Atkinson's Almshouse Charity in April 2021, Mike's professional career included a background in sales and manufacturing. Since joining the charity, he has taken pleasure in "fortifying their procedures and policies to navigate through periods of change, thereby upholding the charity's mission of maintaining its worth, success and supporting the residents". Mike feels grateful for the unwavering support of a dedicated group of trustees and The Almshouse Association and is looking forward to his new role.



Dovehouse Court highly commended in construction awards

Girton Town Charity's new almshouses at Dovehouse Court have received the accolade of 'Highly Commended' in the 2024 Greater Cambridge Design and Construction Awards, run by the Cambridge Forum for the Construction Industry (CFCI) and held at Pembroke College.

Fully-certified Passivhaus almshouses

On presenting the award, judge Maggie Baddeley said: "This is a terrific, fully-certified Passivhaus project by Girton Town Charity that is closely connected to its village setting. It demonstrates very clear sustainability ambitions and has achieved an exemplary design standard for affordable housing. The low-energy homes provided are spacious, colourful and characterful. Together with the community's shared garden, a development has been created that has an uplifting quality, and at the same time has been entirely designed to suit its residents' (and the Charity's) needs.

Inspiring sustainable, high-quality design

She continued: "The judges feel that Dovehouse Court exemplifies 'the art of the possible' for specialist affordable housing (including social housing) and we hope that it will inspire others to pursue similarly ambitious sustainability and high-quality design objectives."

Ann Bonnett, Chair of Girton Town Charity said: "It was a great accolade for Dovehouse Court to be Highly Commended in our category at the CFCI Awards and testament to the vision and tenacity of our trustees and the talented team who worked with us to turn our aspirations into the finished development.

"Residents are already enjoying living there and as an almshouse charity we are proud to have delivered housing that is future-proofed for the residents of Girton for many years to come."



Members of the project team with Ann Bonnett (centre), Chair of Trustees for Girton Town Charity, Cambridgeshire.

Regional meetings

"Great to meet other trustees and discuss mutual challenges."

Our regional meetings, revived after lockdown, are proving to be both popular and successful, with at least one gathering taking place every month across the nation.

More members are taking charge, arranging smaller-scale meetings to assist their peers locally and we are grateful to all those involved. Be it large or small, these gatherings are pivotal in nurturing team-building and empowering members; strengths that lie at the heart of the almshouse movement.

We have received a lot of positive feedback and we are delighted that these meetings are sparking vibrant discussions on a range of challenges. If you have a meeting you would like us to promote on our website, please email admin@almshouses.org with full details. Members can also use the simple toolkit we have created to support meetings which can be found at www.almshouses.org/training-seminars/meetings/

We are actively recruiting more RPRs. If you have been a clerk or a warden or have extensive experience working for an almshouse charity and are interested in becoming a RPR, please see our website for more information.

New homes at St John's Winchester

Years of planning and months of hard work finally paid off as 15 new almshouses were officially opened by St John's Winchester in March 2024. Work to develop the site, which was previously staff accommodation for the Wessex Hotel, started three years earlier. Nearby, no. 108 Colebrook Street was also renovated as part of the project and turned into two one-bedroom flats, a one-bedroom maisonette, communal area, and assisted bathroom. Representatives from the charity and guests, including the Chairman of The Almshouse Association, Willie Hartley Russell, were invited to the unveiling by the Lord-Lieutenant of Hampshire to mark the completion of the project.



Unveiling the new almshouses (from left) Clive Cook, former CEO of St John's, Willie Hartley Russell, Chairman of The Almshouse Association, Nigel Atkinson, Lord-Lieutenant of Hampshire who unveiled the plaque and Roger Bright, Chair of the Trustees.

Clive Cook, former CEO of St John's Winchester, said: "These new almshouses represent a major step in securing the St John's community in central Winchester for generations to come. They are state of the art, energy efficient and designed to facilitate mixing amongst community members and good neighbour relations. Every type of care can be delivered in by our wonderful care team. The vast majority who move in will find a home for life."

Meeting the challenge of recruiting trustees

Members tell us that trustee recruitment remains one of the biggest challenges they face today. Finding suitable people who are qualified in their respective fields and ensuring the trustee body remains quorate and effective can be a challenging task.

Here are our tips to help you find the right trustees when you need them.

● Check your governing document to find out how many trustees your board should have

● Should any of your trustees be nominated by the local council? Are there any restrictions on who can be a trustee? (eg. must they be from a certain parish or do they have any unspent convictions that disqualify them from becoming a trustee?)

● Understand what skills the trustee board already has and what additional skills are needed. This will help you target the right people for the trustee vacancy. Charities should create boards that complement the existing trustees and provide a wide range of skills to tackle any issues as they arise.

● Write an interesting advertisement to attract good candidates

● Your advert should inspire people to join the trustee board. Include the history and founder of the charity, explain what an almshouse is and what difference an almshouse makes to the residents and the community.

● Explain what skills the charity is looking for and how much time trustees would need to commit. Don't forget to give details of how they can apply.

● Advertise via your local newspaper, noticeboards, Community Volunteering Centre (CVS), Lions or Rotary Clubs. Contact large local employers, Chambers of Commerce and/or professional associations. Also contact your local Voluntary Action Group. There may be a dedicated website for your local branch.

● Place your trustee advert online; try free websites such as *Do-It, Reach Volunteering, Women on Boards and Charity Job* and on your social media accounts such as LinkedIn. You could

Look out for our new **Trustee Recruitment Training Workshop** starting this winter

also try local forums such as community Facebook groups and the *NextDoor* app. Remember, you can also advertise on The Almshouse Association website.

● Plan the interview process

● Invite potential trustees to a trustee meeting (take care not to include sensitive or confidential information).

● Hold interviews using a predetermined set of questions.

● Take up references and carry out a DBS check if needed.

● Let unsuccessful, as well as successful, candidates know the outcome of the interview process.

● Provide an effective induction

● Invite new trustees to meet with staff, have a tour of the almshouses and meet the residents.

● Make sure all the documentation they need is in the Trustees' Induction Pack, including a copy of the charity's Governing Document.

● Help new trustees register on The Almshouse Association website and actively encourage them to use the Standards of Almshouse Management guidance manual.



Governing Documents - amending a charity's beneficiary criteria

The Association receives enquiries from members from time to time about their charity's beneficiary criteria and how trustees may go about amending this in the light of changed circumstances or difficulties in attracting applications

for the accommodation. This is understandable, especially in cases where the criteria is very specific and restrictive.

Let's take the hypothetical example of a charity where the current qualification for residents is for them to be: "six poor men of over fifty years of age who, except in special circumstances to be approved by the Charity Commission, are inhabitants of X, Y and Z or the surrounding area; if and so far as residents cannot be found as aforesaid, the trustees may appoint poor men of good character of over fifty years of age who are dependant relatives of inhabitants as aforesaid". Circumstances arise where the trustees find that despite advertising in local parish magazines, placing notices on village notice boards and using social media channels, they are

having difficulty in filling the accommodation when a property becomes vacant. The impact on the charity is that the delay in attracting an applicant leads to a financial loss due to not receiving a weekly maintenance contribution during the period concerned.

The trustees are mindful that under the terms of the charity's constitution they can refer to the Charity Commission for consent on an ad hoc basis to fill the vacancy with a person who is a dependant relative of the residents, but this is not a viable option in view of the Commission's usual response time. The trustees are able to apply to the Charity Commission to widen the beneficiary qualification to state:

(i) "almshouses for six men or women in housing need and of good character who, except in special circumstances to be approved by the Charity Commission, are inhabitants of X, Y and Z or the surrounding area, preference being given to those over 50 years of age" and (ii) "in so far as residents cannot be found as aforesaid, the trustees may appoint men or women in housing need and of good

character who are dependant relatives of inhabitants as aforesaid, preference being given to those over 50 years of age".

In making their application to the Commission, the trustees might wish to state that including both men and women would bring the charity into the 21st century and avoid possible difficulties.

The point could be made that the changes would allow the trustees extra flexibility for the effective and speedy exercise of their discretion and is the reason why the changes are being sought.

It can also be helpful to provide examples of advertisements that have been placed under the existing beneficiary criteria which have not resulted in attracting applicants.

A key point to bear in mind in applying to the Charity Commission for such amendments is that as far as possible trustees would be expected to respect the spirit of the original gift of the benefactor and not to seek to deviate unduly from this.

As always, please do not hesitate to seek guidance from The Almshouse Association if necessary.

Update

Progress on new solar panels and heating system

In the autumn 2023 issue of *The Almshouses Gazette*, David Clark, Chair of Trustees of The Lord Petre & Puckle Charities in Little Burstead, Essex shared his case study on the installation of solar panels and a new heating system to the almshouses. As promised, David has now sent us an update on their impact.

"As reported in the 2023 Autumn Gazette, the installation, both internally and externally, ran extremely smoothly with only minimal disruption to our residents and no disruption to the electrical supply or heating. There were some minor teething problems until the controls had been understood but the back-up from the supply and installation company was very good. Every situation could be easily dealt with by their MD, Russell on his mobile phone wherever he was in the country; from increasing the temperature in a bungalow, to telling me how many kW we had exported.

Residents are very happy

The most important aspect is that our residents are extremely happy with the new heating system and it has been given a big thumbs up by all. In relation to the early financial benefits, the news is more mixed. By British standards, the weather last summer was good, warm and sunny, so our new solar panels were exporting a significant amount of electricity back to the grid through our supplier,



Octopus. Immediately after the completion of the project in June 2023, the installation company had completed all the administrative paperwork for exporting the energy and began sending me regular updates on the kW we were exporting to the grid. We were required to have two new smart meters fitted, one for import and one for export. Appointments were made on three occasions but either the engineer did not arrive or, if he did, he could not install the required meters. The meters were finally installed in November 2023 and although I knew from the installers that we had exported in excess of 10,000 kW, Octopus were only prepared to pay us for energy exported to them from the date that the smart meters were installed. I decided to contact the Energy Ombudsman and complain. Cutting a very long story short, the Ombudsman ruled in our favour and we were awarded £450 compensation

and two letters of apology from Octopus. However, this was only approximately a third of what was expected for exporting energy throughout last summer and autumn. Lesson learned: If you are considering installing solar panels and exporting any excess electricity to the grid, tie your supplier down and ensure they have everything in place from day one.

Significant financial benefits

Importantly though, the charity is already reaping the financial benefits of the project. For the financial year to March 2023 the charity spent £4,456.78 on energy costs compared to £1,898.43 for the latest financial year to March 2024, a significant saving of £2,558.35. The full financial benefits of the project are still to be fully appreciated but based on this early indication we are confident that in time they will be significant."

Lord Mayors visit Dr Thomas White's Almshouses in Bristol

Early in March, The Rev. Dr Thomas White's Almshouses in Redcliffe, Bristol were visited by not one, but two of the city's Lord Mayors. The Lord Mayor for 2023/24, Cllr. Paul Goggin, was accompanied by his predecessor, Cllr. Steve

Pearce and they enjoyed a guided tour of the newly refurbished properties by Debbie Thomas, Manager and Bob Lewis, Chairman.

Originally founded in 1613 and known as Temple Hospital, the charity now has 18 single occupancy bungalows and a manager's house on its own plot of land in central Bristol. It is often described as an "oasis of calm" in a bustling neighbourhood.

The Lord Mayors met with some of the residents including the most senior resident, Maurice Scofield, who celebrated his 94th birthday in May. The charity's founder also gifted an ecclesiastical college and almshouse in London. He was vicar at St Dunstan-in-the-West in Fleet Street for 50 years.

contributed by Debbie Thomas



above (from left): Cllr. Steve Pearce, Debbie Thomas, Cllr. Paul Goggin (2023/24 Mayor) and Alderman Bob Lewis. inset (from left): Cllr. Paul Goggin, 94-year-old resident Maurice Scofield, and Debbie Thomas.

The Almshouse Association Awards

The Almshouse Association Awards celebrate the outstanding achievements of our member charities. Their hard work and inspired innovations not only enrich the lives of almshouse residents, they also support the continued longevity of the almshouse movement. Following visits to the finalists' almshouses, the Awards Committee is excited to announce this year's deserving award recipients for work completed in 2023.



Gardens and People Award

Sloswicke's Almshouse Charity, Nottinghamshire

In 2017, the Charity purchased a former joiner's workshop that dominated the road where their existing nine almshouses are situated. Planning consent was granted to demolish and replace



it with five single bedroom almshouses, two of which are bungalows. They also added a single communal garden with a central seating area as well as a mobility scooter store with appropriate access.

Weston Consolidated Charity, Lincolnshire

Two single-storey, one-bedroomed, bungalows (with a car parking area and the facility to charge a mobility scooter) were built to wheelchair accessibility standards, with the inclusion of integrated solar panels on the roofs of each property. This will greatly improve energy efficiency and the new tree and shrub planting will promote biodiversity.



... congratulations to our Award winners



Innovation for Living Award

Girton Town Charity, Cambridgeshire

Girton Town Charity trustees made a commitment to increase and future proof its almshouses by creating 15 new homes at Dovehouse Court in the heart of the village. They replace six existing bungalows which had been built in the 1930s and 1960s and no longer provided an appropriate standard of accommodation.



The new almshouses are built to conform fully to certified Passivhaus standards, with excellent sustainability credentials, and are situated around a central courtyard. The contemporary homes were designed for extended independent living for the over 55s, with an internal layout to include a master bedroom and small second room, open plan living, kitchen and dining area, with access to balconies or individual terraces on the ground floor.



Charities and social media - part 1

Guidance from the Charity Commission, September 2023

Social media can be a powerful communication tool for charities to raise awareness and funds and to better engage beneficiaries. It can also help charities reach a wider audience, more quickly than traditional methods of communication. But it is important to be aware of the risks, as well as the benefits, and how they can be managed.

Why can it be risky?

- its fast pace can increase the risk of posting content that is inappropriate or harmful
- content, once posted, can be hard to undo
- professional and personal lives can overlap, and the line can become blurred.

If your charity uses social media, what needs to be in place?

- a social media policy needs to be agreed, in place and regularly reviewed – this will give you internal controls that are appropriate and proportionate for your charity's needs and clear to everyone at the charity using social media
- clarity on your charity's purpose – your charity's social media should help you achieve your charity's purpose in a way that is in your charity's best interests
- compliance with relevant laws and rules on the Charity Commission Rules on Political Activity and Campaigning
- ensuring your internal processes keep people safe online including any extra considerations when dealing with vulnerable users.

Some trustees may not use social media regularly, or at all, and want to improve their social media knowledge

and skills. These external links are designed to improve social media literacy, online safety and skills: www.gov.uk/guidance/online-media-literacy-resources and <https://media.trust.org/communications-support/resource-hub/>

Setting a social media policy

Work with your employees or volunteers, particularly those who manage your charity's social media channels, to tailor the content of the policy to meet your charity's needs. How detailed your policy is and how much resource you will need to develop it should match the level of risk presented by how your charity uses social media. It will also depend on the other activities your charity is carrying out.

A policy will help you explain:

- your guidelines around the conduct of trustees, staff and volunteers when using social media on behalf of the charity
- how you will engage with the public on social media, for example your rules on moderating comments on the charity's accounts from those outside the charity
- who is responsible for the day-to-day management of the charity's social media and who

needs to be involved if things go wrong. This includes when trustees need to get involved. At all charities, trustees will have a role in setting and reviewing the policy and in dealing with any significant social media issues or crises. At a large charity, employees will likely manage the charity's social media channels day-to-day, whereas at a small charity it may be one or more trustees who have responsibility for social media

- how your charity uses social media to help deliver your charity's purpose. Charities can use social media in a variety of ways to further their charity's purposes. This may be to engage with the charity's beneficiaries or the wider public on issues directly about what the charity is doing or to highlight its policy positions, or in other ways that support delivery of the charity's purposes, for example, posting a supportive message about a significant national event as part of engaging its followers. Charities should assess any risks of posting about wider issues, be satisfied that it is a proper use of their resources and that the potential benefits outweigh those risks.

Make sure that trustees, staff and volunteers responsible for managing the charity's social media channels are



familiar with the charity's social media policy and the charity's guidelines on the use of personal social media accounts.

Having a policy will help you set your overall approach to social media that's matched to the needs of your charity, identifies the processes you need to support the policy, and what to consider if something goes wrong. For example, having a plan about how you would deal with a social media crisis, such as whether you would make a corrective public statement. For help on what to include in your policy, please go to www.gov.uk/government/publications/charities-and-social-media

Charity Comms has developed a template based on policies from across the charity sector that can be found at www.charitycomms.org.uk/social-media-policy-template or go to 'Model Policies and Templates' on our website.

Part 2 of this article on 'charities and social media' will be published in the autumn issue of the Gazette. This will cover managing potential risks in posting or sharing social media content.



Inspirational Homes Award

United St Saviour's Charity, Southwark

Appleby Blue is an innovative social housing development that reimagines the almshouse concept



for contemporary, inner-city living. By marrying heritage with modernity, Appleby Blue offers affordable housing solutions embracing a resident support model to elevate their quality of life and foster a sense of belonging.

Central to its ethos is community and the communal centre spaces, exemplified by the sociable kitchen at its core which hosts a myriad of events. In tandem with its 63 residents across 57 homes, Appleby Blue's diverse inter-generational community programme encompasses digital skills sessions, dance and exercise classes, and culinary experiences.



Special Community Award

The Charterhouse, London

The judges consider this initiative deserves a special award that has not been granted before. The project consisted of a ten-week programme of drawing masterclasses, guided by an artist/facilitator. These culminated in a co-curated three-month exhibition at The Charterhouse, featuring accompanying text interpretation collaboratively developed by the masterclass participants and professional staff from Charterhouse.

Its specific goals included addressing issues of isolation and exclusion and aimed to strengthen connections between the internal older community and external groups by actively involving local community organisations.



photos: Martine Charalambou

The Almshouse Association Training Hub

online courses

Did you know The Almshouse Association offers 11 online training courses in our training library as part of your membership? They are all free, take about an hour to complete and trainees receive a certificate on successful completion. Courses are listed below and are accessed via the members area on our website. www.almshouses.org/training-seminars/online-training-sessions

an introduction to almshouses

social media awareness

cyber security awareness

GDPR essentials

safeguarding vulnerable adults

mental health awareness

legionella awareness

health & safety basics and essentials

fire awareness

risk assessment

infection prevention and control

It is a good idea to cover these areas for your charity with, perhaps, each trustee taking on a different topic. We recommend that all trustees and staff take the Safeguarding, GDPR and Health & Safety courses as these topics are everyone's responsibility.

Started an online training course, but not finished it? Don't forget to log on again and complete it so you get your certificate.

Note: Please set up individual accounts on the online training platform to ensure your course certificate generates the correct name.

webinars

We host regular webinars with trainers who are specialists in their fields on a variety of current issues almshouse charities are managing. All feature a Q&A at the end where you can put your questions to us.

The webinars are free, unless otherwise stated, and advertised on our website and via email updates.

If you have not signed up to receive these yet, please log into your [personal website profile](#) and set your preferences accordingly (see details alongside).

All our webinars are recorded so that you can watch them at a later date, even if you do not attend. Topics include:

- Charities Act 2022
- Updating your Governing Documents
- Resident Dispute Resolution
- Charity Incorporated Organisations
- When residents lose mental capacity
- Risk Assessments
- Permanent Endowments
- Mergers and Takeovers
- Diversifying your charity board
- Setting aside
- Cyber Security

visit: www.almshouses.org/webinars



Registering on The Almshouse Association's website

All trustees and clerks of member almshouse charities can register in their own right to access the [Members area](#) of The Almshouse Association's website, and we encourage everyone to do so.

You can have as many trustees and staff register from the same charity as required; there is no need to share login details.

If you have not previously registered to access the Members login area - visit our website at www.almshouses.org and click on the 'Members login' dropdown menu; then click on 'Website registration' and complete the fields with your details. Remember, you will need your charity's Almshouse Association

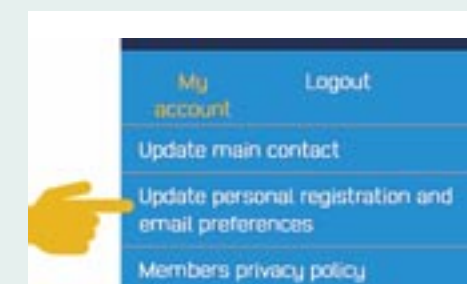
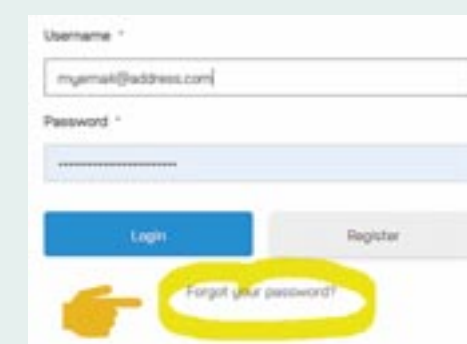


membership number. If your login no longer seems to be working or you cannot remember the password you chose, try resetting your password by clicking on 'Forgot your password' link.

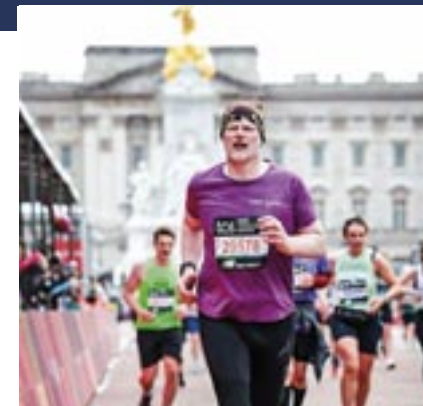
Signed up, but not receiving our e-bulletins?

Log into the [Members Area](#) of our website, navigate to 'My account' on the menu bar, then click on 'Update personal registration and email preferences'.

If you have any problems, the team at The Almshouse Association are here to help. Please call on 01344 452922 or email almshousesupport@almshouses.org



Almshouses in the news



Making a marathon effort to raise funds for almshouses

April was a busy time in the news for almshouses! The Saffron Walden Reporter newspaper included a story on John Stirling, a director at Walden Capital, who raised £2,200 for Saffron Walden Almshouses by running the London Marathon. Gary Hyams, Chair of Saffron Walden Almshouses, said: "We were delighted when Walden Capital made us their charity of the year, but learning about John's decision to nominate us for his marathon fundraising effort was a truly welcome surprise. And to hear that he has raised £2,200 for the almshouses comes as great news. We are very grateful to John and hope that it doesn't take him too long to recover from pounding London's streets."

Discovering what lies behind the Blue Doors in Brixton

BBC news highlighted an exhibition by photographer Jim Grover to celebrate the history of Trinity Homes Almshouses in Brixton, and to mark the 200th anniversary of the almshouse he stepped inside to meet some of the current residents and delve into its history.

Jim said: "I've often wondered what lay behind the blue front doors of this distinctive Georgian building on Brixton's busy Acre Lane; who lives there and what are their stories? How it came to be here and who was the man whose name is prominently displayed above its doors?"



"It's been a wonderful voyage of discovery for me, full of extraordinary revelations that span 200 years. I am so pleased to be able to throw open the doors and share the remarkable and inspiring stories that lie behind them."

For more on this story and a link to Jim's online book, visit www.almshouses.org/news/behind-the-blue-doors/



above: Almshouse resident, Guy Hunting inside Trinity Homes and (left) a resident artist's desk. photos: Jim Grover

THE TIMES



How the Church of England can help solve the housing crisis

Building almshouses on its 100,000 acres of land would be locally popular, nationally valuable and give the church a fresh sense of mission

James Vitali | Wednesday April 24 2024, 12:01am BST, The Sunday Times

Promoting almshouse building

James Vitali, Councillor and Head of Political Economy at [@Policy_Exchange](#) had an article published in The Times on 24 April 2024 which put forward the case for more almshouse building. James Vitali believes that: "the Church of England could recover a sense of social mission by building a new generation of beautiful, charitable almshouses on its 100,000 acres of land". He wrote: "It would be locally popular, nationally valuable and give the church a fresh sense of mission". To read more, visit www.almshouses.org/news/the-almshouse-movements-next-philanthropists

There has been a great deal happening in the policy world – not surprisingly, given an election had been imminent. Most of the legislative changes affect our registered almshouse members only.

For registered providers only

Consumer Standards

The new consumer standards are designed to protect residents and improve the service they receive.

The Regulator of Social Housing (RSH) has set out four new consumer standards for social housing landlords which came into effect on 1 April 2024 and will apply to those members who are registered with the Regulator of Social Housing.

The three existing economic standards still apply as below:

- 1. Governance and Financial Viability Standard
- 2. Value for Money Standard
- 3. Rent Standard

The four revised consumer standards are:

- 1. Safety & Quality
- 2. Transparency, Influence & Accountability
- 3. Neighbourhood & Community
- 4. Tenancy

What this means:

- 1. **Keep an up-to-date record** of the condition of each property detailing compliance with health and safety requirements, Decent Homes Standard and maintenance records.
- 2. **Complete a risk assessment** and address identified risk areas in a timely manner.
- 3. **Have a written process for residents** to report any repairs and communicate timescales to residents for these repairs and a policy for assisting residents requiring housing adaptations.
- 4. Ensure the charity's **Equality and Diversity Policy** includes treating residents and prospective residents with fairness and respect.
- 5. Inform residents of the services the charity provides and how to access these. This can be written into the **Residents' Handbook**.
- 6. Ensure the charity complies with the required obligations of the **Tenant Satisfaction Survey**.
- 7. Charities should have a **Complaints Policy** which details how residents can make a complaint, how complaints will be handled and what action residents can take if dissatisfied.
- 8. Ensure an **Anti-Social Behaviour (ASB) Policy** is in place detailing how a resident can report ASB and any relevant local organisations the charity works with to provide support.
- 9. Ensure the charity has a **Safeguarding Policy** in place that covers how to recognise and respond to cases of domestic abuse and its cooperation with local support agencies.

Templates for the above can be found at www.almshouses.org/model-policies-and-templates/

With regard to any change in tenancy or the way residents are selected in the act, be assured these aspects cannot change in an almshouse charity. The 'licence' is your form of tenancy agreement and trustees must continue to appoint residents who meet the area of need as identified in the governing documents - this does not change. For more details and links, please visit our website at: www.almshouses.org/consumer-standards-for-registered-providers/

General comment

We are having to navigate between legislative changes at present. The unique nature of almshouses is such that our member charities' home and spirit is with the Charity Commission, yet our means of delivering support is through housing, hence we are drawn towards the social housing world and are often seen by the public as a form of housing association. The private rented world will shortly be hit by reform and almshouse charities that are not registered will need to avoid the detrimental policies and charges brought in under that form of legislation.

To this end, we are working to secure recognition of the unique nature of almshouses in the affordable housing and charity sectors. We may need to offer an olive branch of accreditation or confirmation to the Government that our members operate in accordance with the Standards of Almshouse Management but this may be a price worth paying.

Our CEO, Nick Phillips, is seeking views from all sides and stakeholders about how we make this work - to protect the charity status and trustee leadership model, and be recognised by local government to receive support under Section 106 to build more almshouses, whilst not being swept up in the private rented sector!

Outstanding consultations

Awaab's Law

Awaab's Law focusses on the legal obligation to deal with defective property, particularly damp and mould that affect residents' health.

The consultation on Awaab's law has been discussed with many of our Registered Provider members who gave very useful feedback for us to take back to the Government. It goes without saying that all our members would respond immediately if a resident was at risk, however, the consultation included some specific timescales for responding, reporting, repairing and recording that, in some cases, due to the part-time nature of many trustees and clerks, would be unrealistic. Consideration for resources needs to be taken into 'reasonable' account.

Please visit our website for full details and articles on reducing condensation, damp and mould in 'latest news' and 'current issues' in the [members area](#).

Qualification for Social Housing Managers

As per the Social Housing Act, our Registered Providers will need to obtain a grade 5 or 4 (degree) CIH qualification. Grade 5 level for strategic personnel (Trustee) or grade 4 for Managerial personnel (Clerk).

This was considered impractical in many cases and we made our case robustly to the development team at DLUHC and as part of our consultation. We have argued hard for longer periods for clerks to qualify and an exemption for trustees. The DLUHC development team proposed in the consultation that our members have four years from April 2024 to start the qualification (working towards) and four years to complete the course. This is still at consultation stage but CIH (the awarding body) advise they are already inundated with applications. We will keep you informed.

Renters Reform Bill

This Bill, as drafted, does not include almshouses - so why mention it? As it reads today, many of the changes proposed would not have an impact on member charities, but sometimes 'licences' are added to a Bill at the last moment, thereby including almshouses. The Bill includes:

- scrapping Section 21 (eviction notice for leases) - *this does not apply to almshouses.*
- making it illegal not to rent to those on benefits or those who have children - *technically, almshouses do not charge rent; our homes are for those in need and those on benefit are not excluded from consideration. If the terms of the charity exclude children, however, trustees cannot admit families with children.*
- introducing a Private Rented Sector Ombudsman - *This also would not affect almshouses as it is written.*
- tenants being allowed pets unless there is a good reason not to.

New-build bungalows designed for living in later life

In March, Pickering & Ferens Homes shared a preview of their latest development at Padstow Close in Hull. The £3.96 million scheme, delivered by Unity Homes and supported by Homes England funding of £1.32 million,

consists of 24 bungalows specifically designed for living in later life, which are a welcome addition to the area. They incorporate innovative designs inspired by residents' feedback and the development is due for completion

by late summer this year. Claire Warren, CEO of Pickering & Ferens Homes, said: "We are committed to building as many new, high-quality homes as possible, and to be an organisation that people look on with local pride. We are delighted to be in the final stages at Padstow Close and know these properties will become much loved homes for our residents to enjoy."

Cllr Paul Drake Davis, Portfolio Holder for Regeneration and Housing at Hull City Council, said: "Good quality housing is in huge demand and these will provide much needed homes for people to live independently. They have been sensitively designed to complement the character of the area, as well as utilising technology that ensures they are energy efficient."



On site to mark the progress of their latest development are: (from Pickering & Ferens Homes) - Richard Walker, Services Director (second from left); Kate Calvert, Chair (third from the right); Claire Warren, CEO (second from the right); and Wayne Noteman (far right), Director of Regeneration, Unity Housing & Enterprise, with the architect and representatives from Azza Construction, Hull City Council and East Riding Council.

The Charity Governance Code

Good governance in charities is fundamental to their success

A charity is best placed to achieve its ambitions and aims if it has effective governance and the right leadership structures. Skilled and capable trustees will help a charity attract resources and put them to best use. Good governance enables and supports a charity's compliance with relevant legislation and regulation. It also promotes attitudes and a culture where everything works towards fulfilling the charity's vision. The Charity Governance Code is a practical tool to help charities and their trustees develop high standards of governance; it has seven principles:

1. Organisational purpose

The charity's board is clear about the charity's aims and ensures these are being met and delivered effectively. Trustees should consider what processes are in place to review and ensure oversight and measures are instigated to ensure these are effective in regard to changing circumstances.

2. Leadership

The charity's board should be effective in providing strategic leadership based upon the charity's aims and values. It is important that the board leads on strategy, tackles difficult questions and acts decisively in the charity's best interests.

3. Integrity

Trustees should act with integrity, following values and instilling a culture which enables the charity to achieve its purposes. The public's confidence and trust in charities should be always borne in mind and trustees should undertake their duties accordingly. Trustees should also support each other as well as any staff employed and avoid personal agendas in all circumstances.

4. Decision making, risk and control

The board should ensure that its decision-making processes are informed, rigorous and timely. Delegation should be effective, overall control of the charity and risk-assessment ensured and management systems established and monitored. Key issues should be debated openly and adequately.

5. Board effectiveness

The most effective boards are where the trustees are team players, and an appropriate balance of skills is prevalent amongst the board enabling a wide and appropriate balance of skills, experience and knowledge to lead to informed decisions.

6. Equality, diversity and inclusion

The board's approach to diversity should support its effectiveness, leadership and decision making. Ideally, the make-up of a charity's board should be diverse thereby reflecting the diversity of the community.

7. Openness and accountability

A charity's board should influence a culture of transparency and accountability, be open about the charity's work and the input of stakeholders to impact board decisions. Processes should be in place to engage with them and to ensure the effectiveness of those processes.

The Code is not a legal or regulatory requirement. It draws upon, but is fundamentally different to the Charity Commission's guidance. Instead, the Code sets the principles and recommended practice for good governance and is deliberately aspirational: some elements of the Code will be a stretch for many charities to achieve. This is intentional, so that the Code becomes a tool for continuous improvement towards the highest standards.

The importance of portable appliance testing

Although not a legal requirement, portable appliance testing (PAT) is accepted as best practice in ensuring that electrical appliances are safe. The Electricity at Work Regulations 1989 require that any electrical equipment that has the potential to cause injury is maintained in a safe condition. PAT testing, which should be carried out by a competent person, involves a visual inspection and a test using a

portable appliance tester which involves an Earth continuity test and insulation and leakage tests. As PAT testing involves cost it is important to know what items need PAT testing to avoid testing appliances unnecessarily. A far greater concern would be letting potentially hazardous appliances remain unchecked. Electrical appliances using a flexible cable or a plug and socket should be

tested. Whether an appliance needs to be PAT tested depends on the class of the appliance. Class 1 appliances have basic insulation and are most likely to cause harm. Every Class 1 appliance has three wires in the plug: Live (brown), Neutral (blue) and Earth (green and yellow). Typical Class 1 appliances include kettles, toasters, fridges - basically your whole kitchen. The HSE recommends fully PAT testing all Class 1 appliances every one to two years with visual inspections every six months. All Class 2 appliances have additional insulation which makes them safer than Class 1 appliances and renders full PAT tests unnecessary. The added insulation makes Earth wires redundant so there are only Neutral and Live wires in a Class 2 appliance's plug. Appliances such as lamps, photo-



equipment you can move easily. Some stationary Class 1 appliances need PAT testing. For example, fridges or washing machines.

Do new appliances need PAT testing?
PAT testing is not necessary on new electrical equipment if purchased from a reputable business. However, it's still good practice to perform a user check on new equipment as it may have been damaged in transit or was delivered with a fault. Charities would be wise to consider PAT testing on all of the residents' personal electrical equipment which would be a legitimate expense for the charity to bear.

Is PAT testing only for portable appliances?
The 'P' in PAT does stand for portable but this can be misleading as PAT testing is not only recommended for

End of an era at Collingwood & Longstaffe's



Residents, trustees and clerk of Collingwood & Longstaffe's Charity mark the retirement of long-serving chairman, Dr Clive Story (sixth from left). photo: Jon Brook

Dr Clive Story recently retired from the Collingwood & Longstaffe's Charity, High Bentham, Lancashire, which administers the Collingwood Terrace almshouses, having been a trustee since 1989 and chairman for 30 years. At the end of April, residents, trustees and the newly appointed clerk, Emma Greenep, met in the terrace gardens to say "farewell" and thank Clive Story for his many years of service and dedication to the charity.

20th century modernisation

The almshouses were originally set up almost 300 years ago from funds left in 1726 by William Collingwood for the maintenance and support of old housekeepers of the parish. Adaptations and a merger followed and then, soon after he became chairman in the mid-1990s, the trustees decided to undertake a major building scheme, bringing the properties up to 20th century standards to provide residents with safe, comfortable and modern homes. The 12 very basic cottages became nine larger ones with modern kitchens, bathrooms, central heating and pendant alarm systems. The gardens were also restructured. Since then, the properties have con-

tinued to be further improved with larger porches and newer kitchens, new bathrooms and gas central heating.

Final challenge to incorporate

During Dr Story's tenure, the behind-the-scenes governance of the charity changed dramatically and he was instrumental in putting in place a new Health & Safety system, with supporting software that he designed and helped develop. The final challenge he wanted to tackle before retirement was to lead the trustees through the process of changing the charity's legal structure to become a Charitable Incorporated Organisation (CIO). This was recently completed and the charity now has the security of limited liability for the future which should make it easier to attract trustees, without which the charity cannot function. In September 2023, a new clerk to the charity, Emma Greenep, was appointed to replace Ian Wood who had the dual role of clerk and trustee for the last 30 years. This has enabled Ian to succeed Dr Story as the chairman of the charity, although he says: "That it will be a very hard act to follow."

Lessons learnt ...

As Helen Stephenson CBE stepped down from her position as CEO of the Charity Commission, in one of her last speeches as CEO she reflected on seven lessons she has learnt about the charity sector - one for each of her years in office.

1. The role of charity in society
2. No right number of charities
3. The Charity Commission's resources versus expectation
4. The balance of regulation
5. Scrutiny of charity leaders
6. Volunteer trusteeship must remain an attractive proposition
7. Purpose - ride or die

Nick Phillips, CEO of The Almshouse Association believes that, for him, one of these reflections stands out as the most valuable and, in many ways, informs all the rest - Helen's last comment on leadership and direction: "When I reflect on what it is that makes the difference between a charity that succeeds and one that gets lost along the way, it is this: a great charity is one whose trustees and wider leadership, over time, are led always and alone by the charity's purposes. Not by whim, fashion, or funding but by a shared commitment to delivering on the purposes that got the charity on the register in the first place. "This is easy to say, but it can be difficult to achieve day-to-day. It requires consistent leadership and oversight by trustees who are prepared to support, help and hold to account

... reflections of Charity Commission CEO

their executive team. It requires confidence, resilience, and courage - including the courage to say no to funding or a contract that would lead the charity away from its core purpose. Please, if you take anything away with you from what I've said today, let it be this: that as trustees you are first and foremost the steward of your charity's mission. Whatever talent, experience or skill got you on the board in the first place - once you're there, your purpose is the charity's purpose. Don't allow yourself to be swayed from that purpose by anyone or anything."

Clarity of purpose

Having worked for and supported many charities over the years, CEO Nick Phillips agrees, commenting: "Many charities succeed and achieve great things - all have had clarity of purpose in all they do. Almshouses have their Governing Documents that may include a Scheme, Will, letter of intent ... but the key is the founder's wishes and, for almshouse charities, those wishes are, fundamentally, for the provision of warm, safe, secure homes for people in need. "Where I have seen some charities fail is when they lose sight of their



Helen Stephenson CBE

true mission. As one of our founders said when forming The Almshouse Association 78 years ago: "A good charity will always survive and thrive." And no truer statement could be made for the many, many almshouse charities that have continued to stick to their mission of delivering their founders wishes, century after century, to provide safe, warm and affordable homes for people that need them."

To read Helen's speech, please go to: www.gov.uk/government/speeches/reflections-on-my-time-as-ceo

2024 CALENDAR OF EVENTS

Sept	4	Trustees & Clerks Seminar	Shrewsbury
Oct	10	Trustees & Clerks Seminar	Tunbridge Wells

The Almshouse Way

The Almshouse Way 1-day training course is being held at venues throughout the year throughout the country. Visit our website for latest details at www.almshouses.org/the-almshouse-way-1-day-course

THE ALMSHOUSE ASSOCIATION

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Case Study The benefits of undertaking a quinquennial survey

Almost every part of an almshouse (including communal areas) requires regular maintenance. This is where the benefit of undertaking a quinquennial survey comes to the fore.

The purpose of a quinquennial survey is to establish the condition of almshouse dwellings and to plan for any maintenance that will be required, typically over the following five years. This enables trustees to prioritise works and plan their budgets.

Interest-free loan

Following The Melksham Almshouses Charities' latest quinquennial survey, they contacted The Almshouse Association for a loan to enable them to undertake work that had been identified by their latest survey. Russell Lewis, the secretary of the charity who has recently retired, takes up the story:

"The Melksham Almshouses has been an active almshouse charity for the last 160 years and has always been proactive in its maintenance and upkeep of its properties and communal gardens over the decades. Following a major refurbishment in

2013, supported by a 10-year interest-free loan from The Almshouse Association, the trustees instructed Dolmans, Chartered Surveyors in Devizes to undertake a quinquennial survey and report.

This highlighted recommendations to replace all the front windows and doors to the five properties and to



attend to roof and chimney work. The report also highlighted extensive minor repair works to the internal parts of the properties and loft area, including repainting, replacement of old smoke alarms and miscellaneous upgrading of the almshouses.

The residents were made aware that the door and window replacements would improve the warmth of the properties through better insulation and the roof work would enhance their safety and well-being. The residents have commented that the refurbishment has improved their

quality of life and enjoyment. The project was generously supported by a 10-year interest free loan of £40,000 from The Almshouse Association which has greatly aided the Charity. Fortunately, there were no unforeseen circumstances carrying out the project and all three main contractors delivered a quality job on time.

It helped that the almshouses are not listed or in a conservation area and we were very pleased with the comprehensive work of the surveyors. The charity recommends consulting with The Almshouse Association before venturing into such

projects as they are always willing to give guidance and assistance - and are prepared to listen, which is a blessing in this day and age."

KKE join Almshouse Panel of Consultants

Established in 2005, KKE Architects, Worcester, specialise in healthcare design, especially the design of hospices and palliative care.

The practice has a keen agenda to work on socially orientated projects, and has worked with a range of charitable organisations. They are experienced in all aspects of almshouse development and have worked with a number of almshouse charities.

For more information about our Panel of Consultants, please visit the [members area](#) of our website and click on the 'Connect' menu.

The Almshouse Association's Panel of Consultants offer professional advice and services to our members and they have all worked with and been recommended by at least one of our member charities. The Almshouse Association makes every effort to ensure that the details of the Panel are accurate and up to date. Members should satisfy themselves that the services, qualifications and relevant membership of professional bodies meet their particular needs.

If you have any questions regarding undertaking a quinquennial survey, please contact our Member Services team on 01344 452922 or email: almshousesupport@almshouses.org who will be happy to help. You can also refer to our Panel of Consultants www.almshouses.org/panel-of-consultants/

How long to keep a charity's records?

The Association receives regular enquiries about the length of time their charity's records should be retained. The question relates not only to paper records but also electronic and other forms and has cost implications - the longer they are kept, the more expensive it can be.

The actual period that records need to be kept depends on several factors including legal and related requirements, cost, the extent to which documents need to be accessible and, in some cases, historic value. It is necessary for each type of document to be assessed separately and in many instances it is acceptable for them to be retained only for the period required by law.

Sometimes items will be needed as essential points of reference material in future years and trustees may, therefore, decide to keep them longer than the period required by law.

We are pleased to be able to share detailed guidance from Buzzacott accountants in the form of a download that can be accessed via the 'Model Policies and Templates' area of our website. This outlines a suggested period for retaining records, together with an explanation of the recommended retention period. The Almshouse Association recommends almshouse charities create their own bespoke tables detailing the records they hold, with a column indicating the retention time and ideally another column with the archive box number where they are stored.

Bespoke archiving boxes, which can be bought from stationery suppliers, usually have a special area for including the important details of what is inside each box. Adding a 'destroy date' or 'never destroy' can really help make our lives easier!