

HARVEYS AND JUBILEE HOMES

England & Wales · Charity number 1123124

Details

Status Registered

Legal form Other

Registered 2008-03-07

Register [View on the Charity Commission register](#)

Contact

Address 38 Monmouth Court
Chard
TA20 1HQ

Phone 0146065144

Email a.prior@btinternet.com

Activities

Objects: 1) IS THE PROVISION OF HOUSING ACCOMMODATION FOR PERSONS WHO(A) ARE IN NEED, HARDSHIP OR DISTRESS; AND(B) ARE RESIDENT IN THE AREA OF BENEFIT (EXCEPT IN SPECIAL CASES TO BE APPROVED BY THE TRUSTEES); AND(C) ARE, IN THE CASE OF THE PROPERTY KNOWN AS 5 AND 6 JUBILEE CLOSE (THE PROPERTY NUMBERED 1 IN PART 1 OF THE SCHEDULE TO THIS SCHEME), NOT LESS THAN 60 YEARS OF AGE OR WHO ARE INFIRM, WITH A PREFERENCE FOR PERSONS NOT LESS THAN 65 YEARS OF AGE AND ARE OTHERWISE QUALIFIED.2) SUCH CHARITABLE PURPOSES FOR THE BENEFIT OF THE RESIDENTS AS THE TRUSTEES DECIDE.3) THE LAND IDENTIFIED IN PART 1 OF THE SCHEDULE TO THIS SCHEME MUST BE RETAINED BY THE TRUSTEES FOR USE FOR THE OBJECT OF THE CHARITY.

Activities: The charity is an almshouse. It operates a Grade II* listed building known as Harveys containing 8 one bedroomed flats. It also operates 2 one bedroomed bungalows. The former building results from the legacy of Richard Harvey the bungalows replaced four bedsits built to commemorate the diamond jubilee of Queen Victoria.

Classification

- **How:** Provides Buildings/facilities/open Space
- **What:** Accommodation/housing
- **Who:** Elderly/old People

Geography

- **Area of benefit:** NOT DEFINED. IN PRACTICE, SOMERSET
- Somerset

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£59,659	£53,048	-	-
2024-03-31	£54,464	£64,814	-	-
2023-03-31	£49,944	£37,178	-	-
2022-03-31	£50,250	£78,774	-	-
2021-03-31	£49,997	£27,384	-	-

Trustees

Name	Role	Appointed
DICK ARNOLD	Chair	
DR GLANVILL		2012-04-14
LYNDA DIANE LE TAYLOR		
MICHAEL EDWARD FROOM		
Philippa Glastonvill		2023-09-13
Rev Nicolas Jerrett		2025-03-10

Accounts

Trustees of Harveys and Jubilee Homes
Registered charity no 1123124 Almshouse Association no 1382

Annual Report 2024/25

The charity known as Harveys and Jubilee Homes (HJH) is governed by a Scheme of the Charity Commission dated 22nd January 2008. It incorporates two previous almshouse charities: The Charities of Richard Harvey (Harveys charity no 235173) and Jubilee Memorial Cottages (204496). The object of the charity is the provision of housing accommodation for persons who are in need, hardship or distress resident in the area of benefit (the ancient parish of Chard namely Chard, Tatworth, Forton and part of Wadeford) and in the case of Jubilee Memorial bungalows for persons of more than 60 years of age. The Charity owns two freehold properties held by the Official Custodian of charities: Harveys in High Street, Chard, TA20 1QJ and two bungalows numbers 5 and 6 Jubilee Close, Chard, TA20 2DH.

The Charity of Richard Harvey was founded by the will of Richard Harvey dated 17th July 1663 and incorporates the bequests of Florence Spicer and Agnes May Chaffey. The original Jubilee Memorial Cottages (one building with 4 bed-sits) were built in Crimchard in 1902 on a plot called Waggs Pond to commemorate the diamond jubilee of Queen Victoria in 1897 but were replaced with two modern bungalows in 2005.

The Charity Commission Scheme governing HJH stated there would be seven co-opted Trustees and two ex-officio Trustees but the number of co-opted Trustees was reduced to five from 22nd January 2014. All seven co-opted Trustees appointed by the Charity Commission were Trustees of one or both the previous trusts. The ex-officio Trustees are the Mayor of Chard and the Vicar of St Marys Chard for the time being.

The Trustees who served this year were Mesdames Le Taylor, Rev Vye (vicar until September) and Glastonvill and Messrs Arnold (chairman), Froom, and Glanvill. The recently appointed rector of Chard, Rev Nicolas Jerrett accepted the appointment as Trustee and duly signed the Trustees' acceptance book on 10th March 2025.

The Trustees' office and correspondence address is the home of the clerk Mr Anthony Prior, 38 Monmouth Court, Chard T20 1HQ who conducts the day to day management of the charity. The Trustees appointed Mr Adrian Clifford as their independent examiner of the accounts in 2023.

Public benefit requirement for charities: the provision of almshouse accommodation for those in need provides an identifiable public benefit which is directly in line with the founding trusts of Harveys and Jubilee Homes. The Trustees seek applicants whose housing need is not met or is inadequately met by statutory authorities or who are unable to obtain or maintain their own property. The Trustees, contrary to many private landlords, advertise that they are willing to accept housing allowance recipients who tend to be the less well off and thus the Trustees are fulfilling the obligations of their trusts.

The Trustees have no serious incident to report.

The Trustees held pre-arranged quarterly meetings in June, September and December 2023 and March 2024. Mr Arnold and Ms Le Taylor were re-elected chairman and vice-chairman respectively at the first meeting of the year (10th March 2025) as required by the Charity Commission Scheme.

At the 10th June 2024 meeting the Trustees adopted both the independently examined accounts and the annual report for the year 2023/2024. The Trustees were presented with a financial report at every meeting showing income and expenditure to date. In December 2024 the Trustees reviewed their policies (except for finance) and accepted they were fit for purpose. Likewise they examined their insurance cover for the buildings and themselves.

At their March 2024 meeting the Trustees confirmed their Financial and Investment policies and agreed that current free reserves should remain in the range of £10,000 to £15,000 and adopted a budget for 2025/6 which included £12,000 for the Emergency Repair Fund.

The gas boilers at both premises had been serviced on 3rd September, Harveys fire alarm serviced every 6 months and the annual returns submitted to the Charity Commission.

At the September meeting the Trustees agreed the dates for the 2025 meetings but amended them in December to meet the changing needs of the Trustees.

In December the Trustees were shocked that one of their residents had given notice and emigrated to the Philippines. The Trustees held the flat for a month or so in case he returned before authorising clearance and the advertising the vacancy per the Charity Commission scheme paragraph 23 (1). There were two suitable applicants but as flat 3 had also become vacant both were offered an appointment.

The Trustees continued with their quarterly visits to their residents and joined them for the annual lunch on 6th February 2025 at “Jennys” restaurant.

The Trust remained a member of the Almshouse Association and its Gazette was circulated among the Trustees and emails from the Association along with the Charity Commission News were forwarded to the Trustees by the clerk.

Signed by the Chairman

.....
2nd June 2025



Charity name **Harveys and Jubilee Homes**

Charity number (if any)

1 1 2 3 1 2 4

For the period from (start date) to

0 1 0 4 2 4 (end date)

3 1 0 3 2 5

Section A

Receipts and payments

A1 Receipts

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
Contribution WMC	49405				41449
Trust Fund	1064				1025
Interest	1560				1177
Homes Line	250				250
Sunday	228				95
Gas	6886				10210
SCCSP	266				258
Sub total	59659				54464
A2 Asset and investment sales, etc					
Total receipts	59659				54464

A3 Payments

Insurance	2658				2758
Command	4764				5661
Repairs & Maint	19763				26634
Admin	500				545
Club	5037				4632
Sundries	761				1206
SCCSP	141				8118
Gas	7424				260
Sub total	41048				43814
A4 Asset and investment purchases, etc	12000				11000
Total payments	53048				54814
Net of receipts/(payments)	6611				(1380)
A5 Transfers between funds	10000				10000
A6 Cash funds last year end	23237				33587
Cash funds this year end	24848				23237

350

Details	Unrestricted	Restricted	Endowment funds	
	to the nearest £	to the nearest £	funds to the nearest £	funds to the nearest £
B1 Cash funds				
Hot Vast	19083			
CCLA	10764			
Total cash funds (agree balances with receipts and payments account(s))	29847			

Details	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £

B2 Other monetary assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
CCLA D/A	CMF		11,271

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
Mo S Multi Asset	CMF		27199
---	ERF		46772
---	TRUST FUND		24438

B4 Assets retained for the charity's own use

Details	Fund to which liability relates	Amount due (optional)	When due (optional)

B5 Liabilities

Signed by one or two trustees on behalf

Signature Print name

Date of approval of all the trustees

PHILIPPA GLASTONVILL

Lynette de Togh

21/6/2025

Independent Examiner's Report on the Accounts

CC57(b)

Receipts and Payment Accounts

Report to the trustees/members of

HARVEYS AND JUSTICE HOMES

Registered charity number
(optional)

1 1 2 3 1 2 4

On accounts for the year ended

3 1 0 3 2 5

Set out on pages

1 AND 2

**Respective responsibilities of
trustees and examiner**

As the charity's trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does not apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the Act, whether particular matters have come to my attention.

**Basis of independent examiner's
report**

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the view given by the accounts.

**Independent examiner's
statement**

In connection with my examination, no matter has come to my attention (other than that disclosed overleaf *):

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

- to keep accounting records in accordance with section 41 of the Act; and
- to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act

have not been met; or

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

* Please delete the words in brackets if they do not apply.

Signed



Date

15 MAY 2025

Name

ADRIAN ROBERT CLIFFORD

Relevant professional qualification
or body (if any)

ASSOC INSTITUTE OF BANKERS

Address

3 CLIFFS MEAD

PORTON

CHARD

SOMERSET TA20 2NQ

Accounts

Trustees of Harveys and Jubilee Homes
Registered charity no 1123124 Almshouse Association no 1382

Annual Report 2023/24

The charity known as Harveys and Jubilee Homes (HJH) is governed by a Scheme of the Charity Commission dated 22nd January 2008. It incorporates two previous almshouse charities: The Charities of Richard Harvey (Harveys charity no 235173) and Jubilee Memorial Cottages (204496). The object of the charity is the provision of housing accommodation for persons who are in need, hardship or distress resident in the area of benefit (the ancient parish of Chard namely Chard, Tatworth, Forton and part of Wadeford) and in the case of Jubilee Memorial bungalows persons of more than 60 years of age. The Charity owns two freehold properties held by the Official Custodian of charities: Harveys in High Street, Chard, TA20 1QJ and two bungalows numbers 5 and 6 Jubilee Close, Chard, TA20 2DH.

The Charity of Richard Harvey was founded by the will of Richard Harvey dated 17th July 1663 and incorporates the bequests of Florence Spicer and Agnes May Chaffey. The original Jubilee Memorial Cottages (one building with 4 bed-sits) were built in Crimchard in 1902 on a plot called Waggs Pond to commemorate the diamond jubilee of Queen Victoria in 1897 but were replaced with two modern bungalows in 2005.

The Charity Commission Scheme governing HJH stated there would be seven co-opted Trustees and two ex-officio Trustees but the number of co-opted Trustees was reduced to five from 22nd January 2014. All seven co-opted Trustees appointed by the Charity Commission were Trustees of one or both the previous trusts. The ex-officio Trustees are the Mayor of Chard and the Vicar of St Marys Chard for the time being.

The Trustees who served all this year were Mesdames Le Taylor, Rev Vye (vicar) and Messrs Arnold (chairman), Froom, and Glanvill. On 13th September Ms Philippa Glastonvill was co-opted as a Trustee to replace Mr Carl Anderson who had died earlier in the year. On 13th December Richard Arnold and Michael Froom were co-opted for a further term of four years. The Mayor, Cllr Garry Shortland, took up his position as an ex-officio Trustee from 9th May.

The Trustees' office and correspondence address is the home of the clerk Mr Anthony Prior, 38 Monmouth Court, Chard T20 1HQ who conducts the day to day management of the charity. At their March 2023 meeting the Trustees appointed Mr Adrian Clifford as their independent examiner of the accounts.

Public benefit requirement for charities: the provision of almshouse accommodation for those in need provides an identifiable public benefit which is directly in line with the founding trusts of Harveys and Jubilee Homes. The Trustees seek applicants whose housing need is not met or is inadequately met by statutory authorities or who are unable to obtain or maintain their own property. The Trustees, contrary to many private landlords, advertise that they are willing to accept housing allowance recipients who tend to be the less well off and thus the Trustees are fulfilling the obligations of their trusts.

The Trustees have no serious incident to report.

The Trustees held pre-arranged quarterly meetings in June, September and December 2023 and March 2024. Mr Arnold and Ms Le Taylor were re-elected chairman and vice-chairman respectively at the first meeting of the year (13th March 2024) as required by the Charity Commission Scheme.

At the 7th June 2023 meeting the Trustees adopted both the independently examined accounts and the annual report for the year 2022/2023. The Trustees were presented with a financial report at every meeting showing income and expenditure to date.

In December 2023 the Trustees reviewed their policies (except for finance) including an amended Disaster Recovery Plan, and accepted they were fit for purpose.

In March the Trustees reviewed their policy on pets at Harveys, as described in the Residents' Handbook, and adjusted it in the light of the Renters Reform Bill.

At their March 2024 meeting the Trustees confirmed their Financial and Investment policies and agreed that current free reserves should be in the range of £10,000 to £15,000 and adopted a budget for 2024/25 which included £12,000 for the Emergency Repair Fund, £10,000 for the Cyclical Maintenance Fund and an increase in Weekly Maintenance Contributions as discussed in December.

During the course of the year the kitchens in flats 6 and 7 were refurbished and upgrading had been approved for flat 5 together with new carpets in flats 5, 7 and 8. Bungalow 5 had been redecorated throughout.

A new security lock was installed at Harveys on 19th March 2024 and the boilers, fire alarm and smoke detectors were regularly serviced. A new two year gas and electricity contract for Harveys had been signed with British Gas. Updated Energy Performance Certificates had been commissioned for both Harveys and the Jubilee Bungalows.

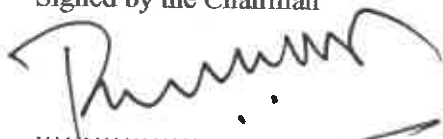
The clerk had attended a training seminar organised by the Almshouse Association and later in the year the new Trustee Ms Philippa Glastonvill had attended a similar course.

Looking into the future the Trustees, at their December meeting, considered a report from the clerk entitled "Maintenance Money and Management". They decided (i) to postpone the Quinquennial Review due in 2024 in the light of the considerable work carried out in recent years (ii) to increase the weekly maintenance contributions from £80 to £100 from 1st April 2024 (iii) as to management the Trustees favoured the current situation of a self-employed clerk providing an office and clerical and management services.

The Trustees continued with their quarterly visits to their residents and joined them for the annual lunch on 28th February 2024 at the Hornsbury Mill.

The Trust remained a member of the Almshouse Association and its Gazette was circulated among the Trustees and emails from the Association along with the Charity Commission News were forwarded to the Trustees by the clerk.

Signed by the Chairman



.....
5th June 2024



Charity name **Harveys and Jubilee Homes**

Charity number (if any)

1 1 2 3 1 2 4

For the period from (start date) to

0 1 0 4 2 3

(end date)

3 1 0 3 2 4

Section A

Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
CONTRIBUTIONS	41449				43260
TRUST FUNDS	1025				920
INTEREST	1177				1037
NEWSHINTS	250				250
SUNDRY	95				
SERVICES (940)	10210				4289
SCCSP	258				237
Sub total	54464				49943
A2 Asset and investment sales, etc					
Total receipts	54464				49943
A3 Payments					
INSURANCE	2758				2345
COMMUNAL EXPENSES	5661				4313
REPAIR & MAINTENANCE	20634				9166
ADMINISTRATION	545				372
CLERK	4632				4436
SUNDRIES	1206				396
GAS	8118				5706
SCCSP	260				415
Sub total	43814				27179
A4 Asset and investment purchases, etc	11000				10000
Total payments	54814				37179
Net of receipts/(payments)	(350)				12766
A5 Transfers between funds	10000				
A6 Cash funds last year end	33587				20828
Cash funds this year end	23237				33587

Section B

Statement of assets and liabilities at the end of the period

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
--	---	---	--

B1 Cash funds

Details

MAT. WEST	22473		
CCLA CDP	764		
	23237		

Total cash funds

(agree balances with receipts and payments account(s))

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
--	---	---	--

Details

B2 Other monetary assets

Details

	Fund to which asset belongs	Cost (optional)	Current value (optional)
M29 CHARITIE	CHF		26588
---	ERE		420027
---	TRUST FD		23889
CCLA	CHF		10721

B3 Investment assets

Details

	Fund to which asset belongs	Cost (optional)	Current value (optional)

B4 Assets retained for the charity's own use

Details

	Fund to which liability relates	Amount due (optional)	When due (optional)

B5 Liabilities

Signed by one or two trustees on behalf

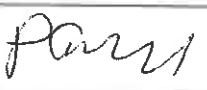
Signature Print name

Date of approval of all the trustees



MICHAEL FROOM

05/06/24



PHILIPPA GASTONVILLE

05/06/24

Independent Examiner's Report on the Accounts

CC57(b)

Receipts and Payment Accounts

Report to the trustees/members of

HARVEYS AND JUSTICE HOMES

Registered charity number
(optional)

1 1 2 3 1 2 4

On accounts for the year ended

3 1 0 3 2 4

Set out on pages

1 AND 2

Respective responsibilities of
trustees and examiner

As the charity's trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does not apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the Act, whether particular matters have come to my attention.

Basis of independent examiner's
report

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the view given by the accounts.

Independent examiner's
statement

In connection with my examination, no matter has come to my attention (other than that disclosed overleaf *):

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

- to keep accounting records in accordance with section 41 of the Act; and
- to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act

have not been met; or

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

* Please delete the words in brackets if they do not apply.

Signed



Date

18 APR 2024

Name

ADRIAN CLIFFORD

Relevant professional qualification
or body (if any)

ASSOC INSTITUTE OF BANKERS

Address

3 CUFFS MEAD

FORTON

CHARD

SOMERSET TA 20 2NQ.

Accounts

Trustees of Harveys and Jubilee Homes
Registered charity no 1123124 Almshouse Association no 1382

Annual Report 2022/2023

The charity known as Harveys and Jubilee Homes (HJH) is governed by a Scheme of the Charity Commission dated 22nd January 2008. It incorporates two previous almshouse charities: The Charities of Richard Harvey (Harveys charity no 235173) and Jubilee Memorial Cottages (204496). The object of the charity is the provision of housing accommodation for persons who are in need, hardship or distress resident in the area of benefit (the ancient parish of Chard namely Chard, Tatworth, Forton and part of Wadeford) and in the case of Jubilee Memorial bungalows persons of more than 60 years of age. The Charity owns two freehold properties held by the Official Custodian of charities: Harveys in High Street, Chard, TA20 1QJ and two bungalows numbers 5 and 6 Jubilee Close, Chard, TA20 2DH.

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The Charity Commission Scheme governing HJH stated there would be seven co-opted Trustees and two ex-officio Trustees but the number of co-opted Trustees was reduced to five from 22nd January 2014. All seven co-opted Trustees appointed by the Charity Commission were Trustees of one or both the previous trusts. The ex-officio Trustees are the Mayor of Chard and the Vicar of St Marys Chard for the time being.

The Trustees who served this year were Mesdames Le Taylor, Rev Vye (vicar) and Messrs Arnold (chairman), Froom, Glanvill and Anderson. Dr Peter Glanvill was co-opted for a further four year term at the September 2022 meeting. The mayor elected by Chard Town Council in May 2022 neither accepted nor declined the appointment as required by the Charity Commission Scheme. However, he resigned his position as councillor and mayor towards the end of 2022.

The Trustees' office and correspondence address is the home of the clerk Mr Anthony Prior, 38 Monmouth Court, Chard T20 1HQ who conducts the day to day management of the charity. At their March 2023 meeting the Trustees appointed Mr Adrian Clifford as their independent examiner of the accounts.

Public benefit requirement for charities: the provision of almshouse accommodation for those in need provides an identifiable public benefit which is directly in line with the founding trusts of Harveys and Jubilee Homes. The Trustees seek applicants whose housing need is not met or is inadequately met by statutory authorities or who are unable to obtain or maintain their own property. The Trustees, contrary to many private landlords, advertise that they are willing to accept housing allowance recipients who tend to be the less well off and thus the Trustees are fulfilling the obligations of their trusts.

The Trustees have no serious incident to report.

The Trustees held pre-arranged quarterly meetings in June, September and December 2022 and March 2023. Mr Arnold and Ms Le Taylor were re-elected chairman and vice-chairman respectively at the first meeting of the year (8th March 2023) as required by the Charity Commission Scheme.

At the 8th June 2022 meeting the Trustees adopted both the independently examined accounts and the annual report for the year 2021/2022. The Trustees were presented with a financial report at every meeting showing income and expenditure to date.

At their December 2022 meeting the Trustees discussed the effects of the energy crisis and the inflated prices of gas and electricity on the residents at Harveys who receive their heating and hot water from a communal boiler. While the contract that expired on the 30th November 2022 was costing less than £4,000 per annum the new contract would be in the region of £12,000. The Trustees agreed to peg the Weekly Maintenance Contribution for 2023/24 but the charge for gas would increase from £10 weekly to £30 weekly per dwelling.

In spite of the extensive work undertaken the previous year further repairs were needed to prevent the ingress of water into flat 4 at Harveys.

At their March 2023 meeting the Trustees confirmed their Financial and Investment policies and agreed that current free reserves should be in the range of £10,000 to £15,000 and discussed their finances in the light of the current financial crisis, especially regarding energy supplies, and agreed to make an investment of £11,000 in their Emergency Repair Fund and adopted a budget for 2023/2024.

The boilers, fire alarm and smoke detectors were regularly serviced. At the December meeting the Trustees reviewed all their policies along with consideration of the major risks to which the charity could be exposed.

The Trustees continued with their quarterly visits to their residents and joined them for the annual lunch on 22nd February 2023 at the Hornsbury Mill .

The Trust remained a member of the Almshouse Association and its Gazette was circulated among the Trustees and emails from the Association along with the Charity Commission News were forwarded to the Trustees by the clerk.

Signed by the Chairman



.....
7th June 2023



Charity name HARVEYS AND JUBILEE HOMES

Charity number (if any) 1123124

For the period from (start date) to 01/04/22 (end date) 31/03/23

Section A

Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
CONTRIBUTIONS	43260				41850
TRUST FUND	920				867
INTEREST	1037				966
NEWSLINE	250				250
SUNDRIES					2105
SERVICES(GAS)	4239				3986
SCCSPA	237				226
Sub total	49943				50250
A2 Asset and investment sales, etc					
Total receipts	49943				50250
A3 Payments					
INSURANCE	2345				2151
COMMUNAL EXPENSES	4313				5630
REPAIRS & MAINT.	9166				4645
ADMINISTRATION	372				387
CLERK	4466				4410
SUNDARY	396				790
SERVICES - GAS	5706				3611
SCCSPA	415				257
MAJOR REPAIRS					56891
Sub total	27179				78774
A4 Asset and investment purchases, etc	10000				10000
Total payments	37179				88774
Net of receipts/(payments)	12765				(38524)
A5 Transfers between funds					
A6 Cash funds last year end	20822				59346
Cash funds this year end	33587				20822

Section B

Statement of assets and liabilities at the end of the period

B1 Cash funds

Total cash funds

(agree balances with
receipts and payments account(s))

Details	Unrestricted	Restricted	Endowment funds
	to the nearest £	to the nearest £	funds to the nearest £
NAT WEST BANK	32823		
CCFA CDF	763		
	33586		

B2 Other monetary assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
789 CHARITIES	CMF		26395
-	QANZ		
-	ERF		384,448
-	TRUST (PUND)		23716

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)

B4 Assets retained for the charity's own use

Details	Fund to which liability relates	Amount due (optional)	When due (optional)

B5 Liabilities

Signed by one or two trustees on behalf

Signature Print name

Date of approval of all the trustees

Linda Taylor

MS LINDA LETAYLOR

07.06.23

Michael Frogg

MR MICHAEL FROGG

07.06.23

Receipts and Payment Accounts

Report to the trustees/members of [HARVEYS AND JUBILEE HOME]

Registered charity number [1123124]
(optional)

On accounts for the year ended [31.03.2023]

Set out on pages [1 and 2.]

**Respective responsibilities of
trustees and examiner**

As the charity's trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does not apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the Act, whether particular matters have come to my attention.

**Basis of independent examiner's
report**

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the view given by the accounts.

**Independent examiner's
statement**

In connection with my examination, no matter has come to my attention (~~other than that disclosed overleaf*~~):

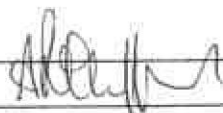
- (1) which gives me reasonable cause to believe that in any material respect the requirements
- to keep accounting records in accordance with section 41 of the Act; and
 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act

have not been met; or

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

* Please delete the words in brackets if they do not apply.

Signed



Date

3 MAY 2023

Name

ADRIAN ROBERT CLIFFORD

Relevant professional qualification
or body (if any)

A.I.B.

Address

3 CURRIS ROAD

FORTON

CHARD

SOMERSET TA 20 2NQ



Charity name

HARVEYS AND JUBILEE HOMES

Charity number (if any)

1123124

For the period from (start date) to

01/04/22 (end date)

31/03/23

Section A

Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
CONTRIBUTIONS	43260				41850
TRUST FUND	920				867
INTEREST	1037				966
NEWSLINE	250				250
SUNDRIES					2105
SERVICES(GAS)	4239				3986
SCCSPA	237				226
Sub total	49943				50250
A2 Asset and investment sales, etc					
Total receipts	49943				50250
A3 Payments					
INSURANCE	2345				2151
COMMUNAL EXPENSES	4313				5630
REPAIRS & MAINT.	9166				4645
ADMINISTRATION	372				387
CLERK	4466				4410
SUNDAY	396				790
SERVICES - GAS	5706				3611
SCCSPA	415				257
MAJOR REPAIRS					56891
Sub total	27179				78774
A4 Asset and investment purchases, etc	10000				10000
Total payments	37179				88774
Net of receipts/(payments)	12765				(38524)
A5 Transfers between funds					
A6 Cash funds last year end	20822				59346
Cash funds this year end	33587				20822

Section B

Statement of assets and liabilities at the end of the period

B1 Cash funds

Total cash funds

(agree balances with
receipts and payments account(s))

Details	Unrestricted	Restricted	Endowment funds
	to the nearest £	to the nearest £	funds funds to the nearest £
NATWEST BANK	32823		
CCFA CDF	763		
	33586		

B2 Other monetary assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
789 CHARITIES	CMF		26395
-	QANZ		
-	ERF		384,448
-	TRUST (PUND)		23716

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)

B4 Assets retained for the charity's own use

Details	Fund to which liability relates	Amount due (optional)	When due (optional)

B5 Liabilities

Signed by one or two trustees on behalf

Signature Print name

Date of approval of all the trustees

Linda Taylor

MS LINDA LETAYLOR

07.06.23

Michael Frogg

MR MICHAEL FROGG

07.06.23

Independent Examiner's Report on the Accounts

CC57(b)

Receipts and Payment Accounts

Report to the trustees/members of [HARVEYS AND JUBILEE HOME]

Registered charity number [1123124]
(optional)

On accounts for the year ended [31.03.2023]

Set out on pages [1 and 2.]

Respective responsibilities of trustees and examiner

As the charity's trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does not apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the Act, whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the view given by the accounts.

Independent examiner's statement

In connection with my examination, no matter has come to my attention (~~other than that disclosed overleaf*~~):

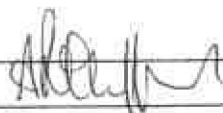
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 - to keep accounting records in accordance with section 41 of the Act; and
 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act

have not been met; or

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

* Please delete the words in brackets if they do not apply.

Signed



Date

3 MAY 2023

Name

ADRIAN ROBERT CLIFFORD

Relevant professional qualification or body (if any)

A.I.B.

Address

3 CURRS HEAD

FORTON

CHARD

SOMERSET TA 20 2NQ

Accounts

Trustees of Harveys and Jubilee Homes
Registered charity no 1123124 Almshouse Association no 1382

Annual Report 2021/2022

The charity known as Harveys and Jubilee Homes (HJH) is governed by a Scheme of the Charity Commission dated 22nd January 2008. It incorporates two previous almshouse charities: The Charities of Richard Harvey (Harveys charity no 235173) and Jubilee Memorial Cottages (204496). The object of the charity is the provision of housing accommodation for persons who are in need or distress resident in the area of benefit (the ancient parish of Chard namely Chard, Tatworth, Forton and part of Wadeford) and in the case of Jubilee Memorial bungalows persons of more than 60 years of age. The Charity owns two freehold properties held by the Official Custodian of charities: Harveys in High Street, Chard, TA20 1QJ and two bungalows numbers 5 and 6 Jubilee Close, Chard, TA20 2DH.

The Charity of Richard Harvey was founded by the will of Richard Harvey dated 17th July 1663 and incorporates the bequests of Florence Spicer and Agnes May Chaffey. The original Jubilee Memorial Cottages (one building with 4 bed-sits) were built in Crimchard in 1902 on a plot called Waggs Pond to commemorate the diamond jubilee of Queen Victoria in 1897 but were replaced with two modern bungalows in 2005.

The Charity Commission Scheme governing HJH stated there would be seven co-opted Trustees and two ex-officio Trustees but the number of co-opted Trustees was reduced to five from 22nd January 2014. All seven co-opted Trustees appointed by the Charity Commission were Trustees of one or both the previous trusts. The ex-officio Trustees are the Mayor of Chard and the Vicar of St Marys Chard for the time being.

The Trustees who served this year were Mesdames Le Taylor, Rev Vye (vicar) and Messrs Arnold (chairman), Froom, Glanvill and Anderson. Ms Le Taylor and Mr Anderson were co-opted for a further four year term at the September 2021 meeting. The current Mayor of Chard exercised his right not to take up the appointment under paragraph 7 (3) (a) of the Charity Commission Scheme.

The Trustees' office and correspondence address is the home of the clerk Mr Anthony Prior, 38 Monmouth Court, Chard T20 1HQ who conducts the day to day management of the charity. At their March 2022 meeting the Trustees appointed Mr Adrian Clifford as their independent examiner of the accounts.

Public benefit requirement for charities: the provision of almshouse accommodation for those in need provides an identifiable public benefit which is directly in line with the founding trusts of Harveys and Jubilee Homes. The Trustees seek applicants whose housing need is not met or is inadequately met by statutory authorities or who are unable to obtain or maintain their own property. The Trustees, contrary to many private landlords, advertise that they are willing to accept housing allowance recipients who tend to be the less well off and thus the Trustees are fulfilling the obligations of their trusts.

The Trustees have no serious incident to report.

The Trustees held pre-arranged quarterly meetings in June, September and December 2021 and March 2022. Mr Arnold and Ms Le Taylor were re-elected chairman and vice-chairman respectively at the first meeting of the year (9th March 2022) as required by the Charity Commission Scheme.

At the 9th June 2021 meeting the Trustees adopted both the independently examined accounts and the annual report for the year 2020/2021. The Trustees were presented with a financial report at every meeting showing income and expenditure to date. At their March 2022 meeting the Trustees confirmed their Financial and Investment policies and agreed that current free reserves should be in the range of £10,000 to £15,000 and discussed their finances in the light of the current financial crisis, especially regarding energy supplies, and agreed to make an investment of £10,000 in their Emergency Repair Fund and adopted a budget for 2022/2023.

The Trustees engaged a local electrician to carry out a quinquennial electrical inspection of the properties who completed the relevant statutory forms and only recommended a minor upgrade of some fittings.

The contractor for the major refurbishment of the metal leaded light windows in the front building of Harveys, agreed in December 2019, was completed with the exception of the internal windows of flats 1 and 2. The contract for the rear building, with a different style of windows, was awarded to a local painter whose price was more competitive than the original contractor for this work.

In the summer of 2021 Chard was hit by a freak storm during which 8 inches of rain fell in 2 hours. While parts of the town were flooded it was the roof gullies in the front building of Harveys that overflowed into the flats 3 and 4. The damage to flat 4 was substantial and the ceiling and one wall had to be completely re-plastered but the contractor found a fault in one of the hoppers which had been causing ongoing problems with the ingress of water. The Trustees hope that the remedial work has solved this problem of water ingress.

The boilers, fire alarm and smoke detectors were regularly serviced. At the December meeting the Trustees reviewed all their policies along with consideration of the major risks to which the charity could be exposed.

The Trustees continued with their quarterly visits to their residents and joined them for a resumed post-covid annual lunch on 4th March 2022.

The Trust remained a member of the Almshouse Association and its Gazette was circulated among the Trustees and emails from the Association along with the Charity Commission News were forwarded to the Trustees by the clerk.

Signed by the Chairman



8th June 2022



CHARITY COMMISSION
FOR ENGLAND AND WALES

Receipts and Paymer Account

Charity name

HARVEYS AND JUBILEE HOMES

Charity number (if any)

1123124

For the period from (start date) to

010421 (end date)

310322

Section A

Receipts and payments

A1 Receipts

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
CONTRIBUTIONS	41,850				43,393
SERVICES	3,986				4,176
INTEREST	966				1,024
TRUST FUND	867				920
SUNDRY	2,105				2
SCCSP	226				337
NEWSLINE	250				250
Sub total	50,250				49,997
A2 Asset and investment sales, etc					
Total receipts	50,250				49,997

A3 Payments

GAS	3,611				3,919
INSURANCE	2,151				2,089
COMMUNAL EXPENSES	5,630				4,282
REPAIRS AND MAINT.	4,645				3,787
CLERK	4,410				4,253
ADMIN. EXPENSES	387				246
SUNDRIES	790				1,654
MAJOR REPAIRS	56,891				7,254
SCCSP	859				
Sub total	78,774				27,584
A4 Asset and investment purchases, etc	10,000				
Total payments	88,774				27,384
Net of receipts/(payments)	(38,524)				22,613
A5 Transfers between funds					
A6 Cash funds last year end	59,346				36,733
Cash funds this year end	20,822				59,346

B1 Cash funds

Total cash funds

(agree balances with receipts and payments account(s))

Details	Unrestricted	Restricted	Endowment funds
	to the nearest £	to the nearest £	funds to the nearest £
NAT. WEST BANK	20,069		
CCLA CAP	763		
	20832		

B2 Other monetary assets

Details	Unrestricted funds	Restricted funds	Endowment funds
	to the nearest £	to the nearest £	to the nearest £
CCLA CAP CHF	463		

B3 Investment assets

Details	Fund to which asset belongs	Cost	Current value
		(optional)	(optional)
M79 CHARITIES	CHF		26,796
--	ERF		368,095
--	TRUST FUND		24,076

B4 Assets retained for the charity's own use

Details	Fund to which liability relates	Amount due	When due
		(optional)	(optional)

B5 Liabilities NIL

Signed by one or two trustees on behalf

Signature

Date of approval of all the trustees

L Le - Taylor

Ms. LYNDY LE TAYLOR

08/06/22

Mr. Carl Anderson

MR. CARL ANDERSON

08/06/22

Independent Examiner's Report on the Accounts

CC57(b)

Receipts and Payment Accounts

Report to the trustees/members of

HARVEYS AND JUBILEE HOMES

Registered charity number
(optional)

1 1 2 3 1 2 4

On accounts for the year ended

3 1 0 3 2 2

Set out on pages

1 AND 2

**Respective responsibilities of
trustees and examiner**

As the charity's trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does not apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the Act, whether particular matters have come to my attention.

**Basis of independent examiner's
report**

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the view given by the accounts.

**Independent examiner's
statement**

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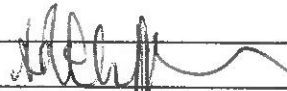
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have not been met; or

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

* Please delete the words in brackets if they do not apply.

Signed



Date

21 APRIL 2022

Name

ADRIAN ROBERT CHIFFORD

Relevant professional qualification
or body (if any)

ASSOCIATE INSTITUTE OF BANKERS

Address

3 CUFFS MEAD

FORTON

CHARS, SOMERSET

TA 20 2NR



CHARITY COMMISSION
FOR ENGLAND AND WALES

Receipts and Payments Account

Charity name **HARVEYS AND JUBILEE HOMES**

Charity number (if any) **1123124**

For the period from (start date) to **010421** (end date)

310322

Section A

Receipts and payments

A1 Receipts

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
CONTRIBUTIONS	41,850				43,393
SERVICES	3,986				4,176
INTEREST	966				1,024
TRUST FUND	867				920
SUNDRY	2,105				2
SCCSP	226				337
NEWSLINE	250				250
Sub total	50,250				49,997
A2 Asset and investment sales, etc					
Total receipts	50,250				49,997

A3 Payments

GAS	3,611				3,919
INSURANCE	2,151				2,089
COMMUNAL EXPENSES	5,630				4,282
REPAIRS AND MAINT.	4,645				3,787
CLERK	4,410				4,253
ADMIN. EXPENSES	387				246
SUNDRIES	790				1,654
MAJOR REPAIRS	56,891				7,254
SCCSP	859				
Sub total	78,774				27,584
A4 Asset and investment purchases, etc	10,000				
Total payments	88,774				27,384
Net of receipts/(payments)	(38,524)				22,613
A5 Transfers between funds					
A6 Cash funds last year end	59,346				36,733
Cash funds this year end	20,822				59,346

B1 Cash funds

Total cash funds

(agree balances with receipts and payments account(s))

Details	Unrestricted funds	Restricted funds	Endowment funds
	to the nearest £	to the nearest £	to the nearest £
NAT. WEST BANK	20,069		
CCLA CAP	763		
	20832		

B2 Other monetary assets

Details	Unrestricted funds	Restricted funds	Endowment funds
	to the nearest £	to the nearest £	to the nearest £
CCLA CAP CHF	463		

B3 Investment assets

Details	Fund to which asset belongs	Cost	Current value
		(optional)	(optional)
M79 CHARITIES	CHF		26,796
--	ERF		368,095
--	TRUST FUND		24,076

B4 Assets retained for the charity's own use

Details	Fund to which liability relates	Amount due	When due
		(optional)	(optional)

B5 Liabilities NIL

Signed by one or two trustees on behalf

Signature

Date of approval of all the trustees

L Le - Taylor

Ms. LYNDY LEE TAYLOR

08/06/22

Mr. CARL ANDERSON

Mr. CARL ANDERSON

08/06/22

Independent Examiner's Report on the Accounts

CC57(b)

Receipts and Payment Accounts

Report to the trustees/members of

HARVEYS AND JUBILEE HOMES

Registered charity number
(optional)

1 1 2 3 1 2 4

On accounts for the year ended

3 1 0 3 2 2

Set out on pages

1 AND 2

**Respective responsibilities of
trustees and examiner**

As the charity's trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does not apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the Act, whether particular matters have come to my attention.

**Basis of independent examiner's
report**

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the view given by the accounts.

**Independent examiner's
statement**

In connection with my examination, no matter has come to my attention (~~other than that disclosed overleaf~~ *):

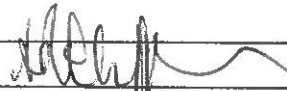
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 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act

have not been met; or

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

* Please delete the words in brackets if they do not apply.

Signed



Date

21 APRIL 2022

Name

ADRIAN ROBERT CHIFFORD

Relevant professional qualification
or body (if any)

ASSOCIATE INSTITUTE OF BANKERS

Address

3 CUFFS MEAD

FORTON

CHARS, SOMERSET

TA 20 2NR

Accounts

Independent Examiner's Report on the Accounts

CC57(b)

Receipts and Payment Accounts

Report to the trustees/members of **HARVEYS AND JUSTICE HOMES**

Registered charity number **1 1 2 3 1 2 4**

On accounts for the year ended **3 1 0 3 2 1**

Set out on pages **1 AND 2**

Respective responsibilities of trustees and examiner

As the charity's trustees you are responsible for the preparation of the accounts; you consider that the audit requirement of section 43(2) of the Charities Act 1993 (the Act) does not apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commissioners under section 43(7)(b) of the Act, whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the view given by the accounts.

Independent examiner's statement

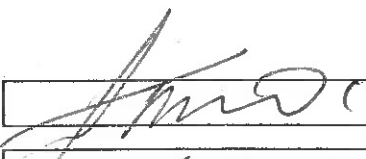
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- (1) which gives me reasonable cause to believe that in any material respect the requirements
 - to keep accounting records in accordance with section 41 of the Act; and
 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act

have not been met; or

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

* Please delete the words in brackets if they do not apply.

Signed 

Date **10 May 2021**

Name **I. J. DAVIES**

Relevant professional qualification or body (if any)

ICWA (RETIRED)

Address

**16 LADYMEAD
12 MINSTER
50 MINSIT
TA19 0FA**



CHARITY COMMISSION
FOR ENGLAND AND WALES

Receipts and Payments Account

Charity name

HARVEYS AND JUBILEE HOMES

Charity number (if any)

1123124

For the period from (start date) to

010420 (end date)

310321

Section A

Receipts and payments

A1 Receipts

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
CONTRIBUTIONS	43383				40279
SERVICES	4176				4220
INTEREST	1024				1028
TRUST FUND	920				920
SUNDARY	7				
SCCSP	237				
NEWSLINE	250				
Sub total	49997				250
A2 Asset and investment sales, etc					46697
Total receipts	49997				46697

A3 Payments

GAS	3919				3251
INSURANCE	2089				2204
COMMUNAL	4282				4700
R & T	3787				7186
CLERK	4253				4200
ADMIN	246				305
SUNDRIES	1554				568
REPAIRS	7254				
Sub total	27384				22414
A4 Asset and investment purchases, etc					10000
Total payments	27384				32414
Net of receipts/(payments)	22613				14283
A5 Transfers between funds					
A6 Cash funds last year end	36733				22450
Cash funds this year end	59346				36733

Section B

Statement of assets and liabilities at the end of the period

B1 Cash funds

Total cash funds

(agree balances with receipts and payments account(s))

Details	Unrestricted	Restricted	Endowment funds
	to the nearest £	to the nearest £	funds to the nearest £
NAT. WEST	58583		
CCLA CDF	763		
	59346		

B2 Other monetary assets

Details	Unrestricted funds	Restricted funds	Endowment funds
	to the nearest £	to the nearest £	to the nearest £
CCLA CDF/CMF	463		

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
M & G CHARITIES	CMF		25151
---	ERF		323835
---	TRUST FUNDS		22055

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
FREEMONA PROPBT			
HALVIEW			2,602,099
JURIA FE			364,421

Signed by one or two trustees on behalf

Signature Print name

Date of approval of all the trustees

LINDA LIE TAYLOR

L. L. Taylor

09/06/21

GEORGINA AVEY

G. Avey

09/06/21

Trustees of Harveys and Jubilee Homes

Registered charity no 1123124 Almshouse Association no 1382

Annual Report 2020/21

The charity known as Harveys and Jubilee Homes (HJH) is governed by a Scheme of the Charity Commission dated 22nd January 2008. It incorporates two previous almshouse charities: The Charities of Richard Harvey (Harveys, charity no 235173) and Jubilee Memorial Cottages (204496). The object of the charity is the provision of housing accommodation for persons who are in need or distress resident in the area of benefit (the ancient parish of Chard namely Chard, Tatworth, Forton and part of Wadeford), and in the case of the Jubilee bungalows persons of more than 60 years of age. The charity owns two freehold properties held by the Official Custodian of Charities: Harveys in High Street Chard TA20 1QJ and two bungalows in Jubilee Close Chard TA20 2DH.

The Charity of Richard Harvey was founded by the will of Richard Harvey dated 17th July 1663 and incorporates the more modern charities of Florence Spicer and Agnes May Chaffey. The original Jubilee Memorial Cottages were built in 1902 to commemorate the diamond jubilee of Queen Victoria of 1897 but were replaced with two modern bungalows in 2005.

The Charity Commission Scheme governing HJH stated that there would be seven co-opted trustees and two ex-officio trustees but the number of co-opted Trustees was reduced to 5 from 22nd January 2014. All seven co-opted Trustees appointed by the Charity Commission were Trustees of one or both of the previous trusts. The ex-officio Trustees are the mayor of Chard and the vicar of St Marys Chard for the time being.

The Trustees who served this year were Mesdames Le Taylor, Rev Vye (vicar) and Messrs Arnold (chairman), Froom, Glanvill and Anderson. Mr Richard Arnold and Mr Michael Froom were co-opted for a further four year term at the December meeting. The current Mayor of Chard exercised his right not to take up the appointment under Paragraph 7 (3) (a) of the Charity Commission Scheme.

The Trustees' office and correspondence address is at the home of the clerk, Mr Tony Prior, 38 Monmouth Court, Chard, TA20 1HQ who conducts the day to day management of the charity. The charity's bankers are NatWest PLC. The charity has no appointed solicitor, but Mr Arnold is a solicitor. Mr William Smith retired as independent examiner and Mr James Davies was appointed for 2020/21 He duly examined and signed off the accounts and completed the Charity Commission form CC57 (b).

Public benefit requirement for charities: the provision of almshouse accommodation for those in need provides an identifiable public benefit which is directly in line with the founding trusts of Harveys and Jubilee Homes. The Trustees seek applicants whose housing need is not met or is inadequately met by statutory authorities or who are unable to obtain or maintain their own property. The Trustees, contrary to many private landlords, advertise that they are willing to accept housing allowance recipients who tend to be the less well off and thus the Trustees are fulfilling the obligations of their trusts.

The trustees have no serious incident to report.

The Trustees held pre-arranged quarterly meetings in September and December 2020 and March 2021. The June meeting was cancelled because of the Covid 19 pandemic. Mr Arnold and Mrs Le Taylor were re-elected as chairman and vice chairman respectively at the first meeting of the year (10th March 2021) as required by the Charity Commission Scheme.

At the 16th September 2020 meeting the Trustees adopted both the independently examined accounts and the annual report for the year 2019/20. The Trustees were presented with a financial report at every meeting showing income and expenditure to date. At their March 2021 meeting the Trustees confirmed their Financial and Investment policies, agreed that current “free” reserves should be in the range of £10,000 to £15,000 and adopted a budget for 2021/22.

The Trustees commissioned a surveyor to value their properties for insurance purposes. The valuation did not include any VAT element should that be liable on repairs made in pursuit of an insurance claim. As the current insurance valuation from the brokers would cover the VAT the Trustees accepted that valuation for insurance purposes.

The boilers, fire alarm and smoke detectors were regularly serviced. At the December meeting the Trustees reviewed their policies: Disaster Recovery Plan, the Residents’ Handbook, Residents Application Form, Safeguarding, Equal Opportunities, Legionella, Responsibilities of the Clerk, Data Protection, and Health and Safety. At this meeting the charity Trustees also gave consideration to the major risks to which the charity is exposed and satisfied themselves that systems or procedures are established in order to manage those risks. The Financial and Investment Policy was reviewed at budget time in March.

The Trustees continued quarterly visits to their residents.

The Trust remained a member of the Almshouse Association and the Almshouse Gazette was circulated among the Trustees but the Charity Commission News is now only produced on-line and emailed to the clerk who forwarded it to the Trustees.

Signed by the Chairman

...Richard Arnold.....
9th June 2021.

Trustees of Harveys and Jubilee Homes

Registered charity no 1123124 Almshouse Association no 1382

Annual Report 2020/21

The charity known as Harveys and Jubilee Homes (HJH) is governed by a Scheme of the Charity Commission dated 22nd January 2008. It incorporates two previous almshouse charities: The Charities of Richard Harvey (Harveys, charity no 235173) and Jubilee Memorial Cottages (204496). The object of the charity is the provision of housing accommodation for persons who are in need or distress resident in the area of benefit (the ancient parish of Chard namely Chard, Tatworth, Forton and part of Wadeford), and in the case of the Jubilee bungalows persons of more than 60 years of age. The charity owns two freehold properties held by the Official Custodian of Charities: Harveys in High Street Chard TA20 1QJ and two bungalows in Jubilee Close Chard TA20 2DH.

The Charity of Richard Harvey was founded by the will of Richard Harvey dated 17th July 1663 and incorporates the more modern charities of Florence Spicer and Agnes May Chaffey. The original Jubilee Memorial Cottages were built in 1902 to commemorate the diamond jubilee of Queen Victoria of 1897 but were replaced with two modern bungalows in 2005.

The Charity Commission Scheme governing HJH stated that there would be seven co-opted trustees and two ex-officio trustees but the number of co-opted Trustees was reduced to 5 from 22nd January 2014. All seven co-opted Trustees appointed by the Charity Commission were Trustees of one or both of the previous trusts. The ex-officio Trustees are the mayor of Chard and the vicar of St Marys Chard for the time being.

The Trustees who served this year were Mesdames Le Taylor, Rev Vye (vicar) and Messrs Arnold (chairman), Froom, Glanvill and Anderson. Mr Richard Arnold and Mr Michael Froom were co-opted for a further four year term at the December meeting. The current Mayor of Chard exercised his right not to take up the appointment under Paragraph 7 (3) (a) of the Charity Commission Scheme.

The Trustees' office and correspondence address is at the home of the clerk, Mr Tony Prior, 38 Monmouth Court, Chard, TA20 1HQ who conducts the day to day management of the charity. The charity's bankers are NatWest PLC. The charity has no appointed solicitor, but Mr Arnold is a solicitor. Mr William Smith retired as independent examiner and Mr James Davies was appointed for 2020/21 He duly examined and signed off the accounts and completed the Charity Commission form CC57 (b).

Public benefit requirement for charities: the provision of almshouse accommodation for those in need provides an identifiable public benefit which is directly in line with the founding trusts of Harveys and Jubilee Homes. The Trustees seek applicants whose housing need is not met or is inadequately met by statutory authorities or who are unable to obtain or maintain their own property. The Trustees, contrary to many private landlords, advertise that they are willing to accept housing allowance recipients who tend to be the less well off and thus the Trustees are fulfilling the obligations of their trusts.

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