

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

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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)

(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				(380)
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

FORTON

CHARD

SOMERSET TA20 2NQ