

The Drs Green and Slater Rest Houses CIO

Report and financial statements

For the period ended 31 October 2024

The Drs Green and Slater Rest Houses CIO
Reference and administrative information
for the period ended 31 October 2024

Charity number 1200606

Registered office and operational address

Balmoral Road, Heaton Moor, SK4 4EA

There is also the charity of The Drs Green and Slater Rest Houses (222486) registered at this address. The CIO will supersede that on 1st November 2024.

Trustees

Trustees who served during the year and up to the date of this report were as follows:

Chair	Frances McCann
	Tim Carlisle
	David McHugh
	Jane Barrett
	Wendy Taylor

No trustees held title to property belonging to the CIO during the reporting period or at the date of approval.

Bankers

Cooperative Bank
Account number 6732228400, sort code 08-92-99

Solicitors

Slater Heelis
86 Deansgate, Manchester, M3 2ER

Auditors/IE

Slade & Cooper Limited
Beehive Mill, Jersey St, Manchester, M4 6JG

The Drs Green and Slater Rest Houses CIO
Trustees' annual report
for the period ended 31 October 2024

The trustees present their report and the unaudited financial statements for the period ended 31 October 2024.

Reference and administrative information set out on page 1 forms part of this report. The financial statements comply with current statutory requirements, the CIO's constitution and the Statement of Recommended Practice - Accounting and Reporting by Charities: SORP applicable to charities preparing their accounts in accordance with FRS 102.

Objectives and activities

The Green and Slater Rest Houses are for the residence and use of elderly and eligible persons who have lived for at least ten years either in the Metropolitan Borough of Stockport district of Greater Manchester, or within 5 miles of Stockport Town Hall. No regard is given to their religious or political opinions. They must be able to live independently.

When a vacancy occurs, advertisements are placed locally, and local housing agencies are consulted. An applicant must complete a form, which includes questions about financial means. Each applicant for residence is interviewed by 2 trustees, and their report must be agreed at a meeting of trustees. If an applicant is considered suitable and there are no vacancies a waiting list is kept and updated regularly.

The Rest Houses were set up by trustees appointed to carry out the terms of the will of Dr Harry Slater. When Dr Slater died in 1949, he directed in his will that a trust fund be established that would be used to build and give continuing support to a sheltered housing scheme that would provide independent living accommodation for older people residing in the Stockport area.

The trustees are aware of the Charity Commission guidance on Public Benefit and feel that the provision and maintenance of the sheltered accommodation described is of benefit to the public. Both trustees and the manager are concerned that all residents feel part of a mutually supportive community and receive daily checks on their welfare.

The trustees review the aims, objectives and activities of the CIO each year. This report looks at what the CIO has achieved and the outcomes of its work in the reporting period. The trustees report the success of each key activity and the benefits the CIO has brought to those groups of people that it is set up to help. The review also helps the trustees ensure the CIO's aims, objectives and activities remained focused on its stated purposes.

The trustees have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the CIO's aims and objectives and in planning its future activities. In particular, the trustees consider how planned activities will contribute to the aims and objectives that have been set.

Achievements and performance

There have been no achievements this year as the CIO exists in name only. All activities are still performed by the unincorporated charity.

Financial review

The Drs Green and Slater Rest Houses CIO had no financial activity for the period of this report.

The Drs Green and Slater Rest Houses CIO Trustees' annual report

for the period ended 31 October 2024

Plans for the future

It is planned to transfer all assets, including land and buildings to the CIO from the unincorporated charity, and that legal process will complete on 1st November 2024. When complete, the CIO will assume all activities of the unincorporated charity, and all contracts with staff and suppliers will be transferred.

A new bank account has been opened for the CIO but is not yet active. It will become active on 1st November 2024.

At a future date the land will be registered with the Land Registry as being the property of the CIO.

Structure, governance and management

There must be at least five CIO trustees when the CIO becomes active. If the number falls below this minimum, the remaining trustee or trustees may act only to call a meeting of the CIO trustees or appoint a new CIO trustee.

A stipulation in the constitution is that all trustees must, at the time of their appointment, be a member, regular attender, or sympathetic to the views of the Society of Friends, commonly known as Quakers.

The organisation is a charitable incorporated organisation, registered as a charity on 7th October 2022 in England and Wales.

The CIO is constituted under a constitution dated 6th October 2022. The trustees are members of the CIO but this entitles them only to voting rights. The trustees have no beneficial interest in the CIO.

All trustees give their time voluntarily and receive no benefits from the CIO. No expenses were reclaimed from the CIO.

Related parties and relationships with other organisations

Almshouses Association – The CIO's membership of the umbrella organization that supports independent housing charities the Almshouse Association has continued to be a valued and much used resource by both trustees and staff.

Statement of responsibilities of the trustees

Law applicable to charities in England and Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the CIO's financial activities during the period and of its financial position at the end of the period. In preparing financial statements giving a true and fair view, the trustees should follow best practice and:

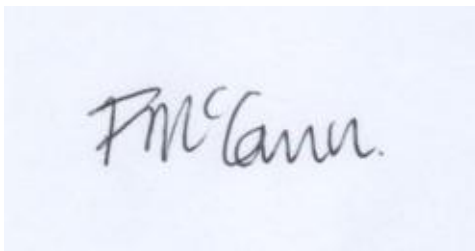
- Select suitable accounting policies and then apply them consistently
- Observe the methods and principles in the Charities SORP
- Make judgements and estimates that are reasonable and prudent
- State whether applicable UK Accounting Standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the CIO will continue in operation

The Drs Green and Slater Rest Houses CIO
Trustees' annual report
for the period ended 31 October 2024

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the CIO and enable them to ensure that the financial statements comply with the Charities Act 2011. They are also responsible for safeguarding the assets of the CIO and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the CIO's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

The trustees' annual report has been approved by the trustees on 14.07.2025 and signed on their behalf by

A handwritten signature in dark ink, appearing to read 'F McCann', is centered within a light blue rectangular box.

Name; Frances McCann

Title; Chair of Board of Trustees