



Trustees' Annual Report for the period

From Period start date 1 January 2023 To Period end date 31 December 2023

Charity name: James Goodman Almshouse Charity

Charity registration number: 200302

Objectives and Activities

	SORP reference	
<p>Summary of the purposes of the charity as set out in its governing document</p>	<p>Para 1.17</p>	<p>The almshouses belonging to the charity and the property occupied therewith shall be appropriated and used for the accommodation of residents in conformity with the provisions of this scheme. (1) subject to payment of the expenses (2) the trustees may pay for such items (3) in exceptional cases the trustees may grant relief to persons otherwise eligible</p>
<p>Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.</p>	<p>Para 1.17 and 1.19</p>	<p>Accommodation/housing for elderly/old People</p>
<p>Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit</p>	<p>Para 1.18</p>	<p>In setting the aims and objectives, and in measuring achievements and performance, the charity has had regard to the Charity Commission's guidance on public benefit. The provision of almshouse accommodation for those in need provides identifiable public benefit which is consistent with the aims of the trust document. Beneficiaries of almshouse accommodation must be in need, and will be drawn from that section of the public which has been defined in the Scheme issued by the Charity Commission.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	Policy on grant making
	Para 1.38	

Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	There are twenty three almshouses. The trustees employ a clerk to exercise day to day management who reports to the trustees on a regular basis, and for any further guidance as and when necessary. The general condition is good, although the eight older almshouses require more maintenance and longer term improvement. During the year the regular maintenance continued. Further plans are being considered to provide on site parking at one of the older property sites. As at 31 December 2023, twenty one of the twenty three properties were occupied and two older properties are undergoing significant internal refurbishment.

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

Financial Review

<p>Review of the charity's financial position at the end of the period</p>	Para 1.21	<p>The Trustees have reviewed the major risks to which the charity is exposed and systems have been established to mitigate those risks. Operationally, the key risks arise from voids, and from the condition and security of the properties. To mitigate these risks, the Trust has appointed a clerk who is responsible for advertising for new, qualifying residents as and when appropriate; for monitoring the condition and security of the properties; for advising the Trustee and implementing their decisions. The clerk is also responsible for liaising with the residents and for reporting any concerns. Additionally, residents must be capable of independent living when appointed. Strategically, the principal challenge is to ensure that the accommodation provides appropriately for the residents needs on an ongoing basis.</p>	Para 1.22	<p>Statement explaining the policy for holding reserves stating why they are held</p>	Para 1.22	<p>Amount of reserves held</p>	<p>Cash reserves at 31 December 2023 are £38,865 (2022: £136,083)</p>	Para 1.22	<p>Reasons for holding zero reserves</p>	Para 1.22	<p>N/A</p>	<p>Details of fund materially in deficit</p>	Para 1.24	<p>N/A</p>	<p>Explanation of any uncertainties about the charity continuing as a going concern</p>	Para 1.23	<p>N/A</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	The Charity is governed by a Charity Commission Scheme dated 14th January 1997.
How is the charity constituted? (e.g. unincorporated association, CIO)	Para 1.25	The Charity is Unincorporated association
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	

Additional information (optional)
You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	James Goodman Almshouse Charity
Other name the charity uses	N/A
Registered charity number	200302
Charity's principal address	11 Goodman Court Cranfield Bedfordshire MK43 0WZ

Names of the charity trustees who manage the charity

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1 G I A Holman (Chair)			
2 J Howe			
3 C Shiner			
4 J Lloyd			
5 J Rust			
6			
7			
8			
9			
10			

Corporate trustees – names of the directors at the date the report was approved

Director name	N/A

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	N/A

Funds held as custodian trustees on behalf of others

N/A	Description of the assets held in this capacity
N/A	Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects
N/A	Details of arrangements for safe custody and segregation of such assets from the charity's own assets

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

Exemptions from disclosure

Reason for non-disclosure of key personnel details

N/A

Other optional information

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	G. A. Holman		
Full name(s)	G I A Holman		
Position (eg Secretary, Chair, etc)	Chairman		
Date	30 July 2024.		



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A Independent Examiner's Report

Report to the trustees/
members of

Charity Name
James Goodman Almshouse Charity

On accounts for the year
ended

31 December 2023	Charity no (if any)	200302
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Set out on pages

8-9	8-(remember to include the page numbers of additional sheets)
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I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 / 12 / 2023.

Responsibilities and
basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed:

Name:

Howard Ashmore

Relevant professional
qualification(s) or body
(if any):

FCA

Address:

Godfrey Laws & Co Limited
69 Knowl Piece, Wilbury Way, Hitchin, Hertfordshire
SG4 0TY

IER

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

No professional valuation for Freehold properties has been examined. Closing valuation for Freehold properties is based on the best estimate by the trustees.

Receipts and payments accounts

For the period from

To

31/12/2023

CC16a

Section A Receipts and payments

Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £

At Receipts

[illegible]

A2 Asset and investment sales,

A2 Asset and Investment sales, (see table). Sale of plot 30 (19 Hollowday) Sale of M&G units	Sub total	826,726	-	-	826,726	-
		526,726	-	-	526,726	-
		300,000	-	-	300,000	-

Total receipts

111,534	960,819	-	-	960,819
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A3 Payments

[illegible]

A4 Asset and investment

44 Asset and investment purchases,					
Freehold properties additions	954,835				
Purchase of investment	3,000	-			
			-		
	954,835			3,000	
					115,804

Sub total

118,804	957,835	-	-	957,835
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Total payments

1,058,037	-	-	1,058,037
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Net of receipts/(payments)

-	97,218	-	-	-	97,218	-
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A6 Cash funds last year end

136,083	-	-	136,083
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Cash funds this year end

7/9,052	38,863	-	-	38,863
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Section B Statement of assets and liabilities at the end of the period

Categories

B1 Cash funds

Details	Total cash funds		
	Bank balances carried forward		
Unrestricted funds	-	38,865	38,865
Restricted funds	-	-	-
Endowment funds	-	-	-

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

B2 Other monetary assets

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

B3 Investment assets

Details	Quoted investments		
	asset belongs	Cost (optional)	Current value (optional)
Unrestricted	Unrestricted	-	419,775
Unrestricted	Unrestricted	-	34,994
			-

B4 Assets retained for the charity's own use

Details	Freehold properties-used in delivering objectives		
	asset belongs	Cost (optional)	Current value (optional)
Unrestricted	Unrestricted	-	6,284,399
			2,912
			-
			-
			-

B5 Liabilities

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

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	G I A Holman	