



Trustees' Annual Report for the period

From 01/04/24 Period start date

To 31/03/25 Period end date

Charity name: Barlow Homes for Aged Persons

Charity registration number: 203035

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	Barlow Homes provides accommodation of 37 bungalows for elderly and disabled residents with links to the local area of Oldbury. There is a community hall on the estate that is used by the residents, local community groups and for local elections.
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.	Para 1.17 and 1.19	The Trust provides bungalow accommodation for elderly and disabled residents with links to Oldbury.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have had regard to the guidance issued by the Charity Commission on public benefit. https://www.gov.uk/guidance/public-benefit-rules-for-charities

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	The Trust does not undertake any social investment activities, or a policy on grant making.
Policy on social investment including program related investment	Para 1.38	The Trust does not undertake any social investment activities, or a policy on grant making.
Contribution made by volunteers	Para 1.38	The Trust does not employ volunteers.
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	A high quality of homes on the estate which are popular and short periods of void lets. The community hall is used by a local dementia charity as well as residents.

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	The Trust continues to provide quality housing for elderly and disabled residents.
Performance of fundraising activities against objectives set	Para 1.41	The Trust does not undertake fundraising activities and is funded from rents and income from the rent of the community hall to a local dementia charity.
Investment performance against objectives	Para 1.41	The Trust has not made any investments in the last financial year.
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The final outturn as at 31/3/25 was a surplus of £84,447 which was transferred into reserves. This was higher than expected due to a reduction in repairs spend and interest received on cash balances, offset by increased voids costs during the year.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	There is no definitive policy but as a guide the Trust looks to have at least 10% of its annual rent income set aside in balances. The actual level of balances as at 31/3/25 is significantly above this level.
Amount of reserves held	Para 1.22	£545,483
Reasons for holding zero reserves	Para 1.22	
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the	Para 1.23	

charity continuing as a going concern		
---------------------------------------	--	--

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	Rental income from the properties is the main source of income.
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	Trust deed
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Independent Trust
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	Appointed by Sandwell MBC

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	Barlow Homes For Aged Persons
Other name the charity uses	
Registered charity number	203035
Charity's principal address	Sandwell Metropolitan Borough Council Democratic Services Oldbury Council House, West Midlands B69 3BS

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	Sandwell MBC	Sandwell MBC PO BOX 2374, Oldbury, West Midlands B69 3DE		
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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

Director name		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
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)

Mike Jones - Assistant Director for Legal and Assurance and Monitoring Officer.

Exemptions from disclosure

Reason for non-disclosure of key personnel details

--

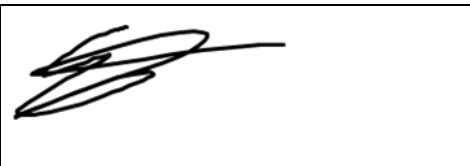
Other optional information

--

Declarations

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

Signed on behalf of the charity’s trustees

Signature(s)		
Full name(s)	Ellen Fenton	
Position (eg Secretary, Chair, etc)	Chair Barlow Homes Management Committee	
Date	19.1.2026	

BARLOW HOMES 2024/25
REVENUE ACCOUNT FOR THE FINANCIAL YEAR 2024/2025

Budget 2024/25	Description	Outturn 2024/25	Variance Actual vs Budget
£		£	£
	INCOME		
0	Interest Receivable	0	0
(300)	Hire of Hall	0	300
(162,900)	Rents of Dwellings	(155,463)	7,437
(163,200)	Total Income	(155,463)	7,737
	EXPENDITURE		
26,550	Maintenance of Grounds	26,314	(236)
3,000	Treeworks	0	(3,000)
48,000	Response Repairs/Call Out/voids	37,190	(10,810)
1,500	Gas - Community Hall	2,474	974
1,500	Electricity - Community Hall	2,761	1,261
800	Council Tax - Void Properties	0	(800)
700	Water Charges - Community Hall	1,270	570
1,200	Internal Cleaning Recharge	984	(216)
8,000	Insurance Premiums	9,253	1,253
50	Printing	50	0
100	Postage	100	0
600	Community Alarms Line Rental	0	(600)
1,000	Broadband	1,567	567
100	ICT hardware / software	0	(100)
500	Events / miscellaneous	925	425
8,700	Recharge from SMBC	9,600	900
0	Legal Charges	1,000	1,000
600	National Non Domestic Rates	349	(251)
102,900	Total Expenditure	93,837	(9,063)
0	Interest Receivable	(22,821)	(22,821)
(60,300)	Deficit/(Surplus)	(84,447)	(24,147)
Statement of Movement in Reserve			
Balance at 1st April 2024		(461,036)	
Surplus in Year		(84,447)	

Balance at 31st March 2025	(545,483)