

WILLIAM BARBER'S ALMSHOUSE CHARITY

England & Wales · Charity number 211189

Details

Other names	THE JUBY AND BARBER CHARITIES, WILLIAM BARBERS ALMSHOUSE CHARITY
Status	Registered
Legal form	Other
Registered	1962-10-26
Register	View on the Charity Commission register

Contact

Address	38 Factory Lane Roydon Diss IP22 4EG
Phone	01379658813
Email	jenshorter@icloud.com

Activities

Objects: SEE INDIVIDUAL CONSTITUENTS

Activities: Provision and maintenance of almshouses.

Classification

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

Geography

- **Area of benefit:** PARISH OF NEW BUCKENHAM
- Norfolk

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£26,212	£5,005	-	-
2023-12-31	£22,691	£16,397	-	-
2022-12-31	£23,080	£10,314	-	-
2021-12-31	£21,022	£26,615	-	-
2020-12-31	£23,143	£5,439	-	-

Trustees

Name	Role	Appointed
Alison Mary Hogg		2026-05-18
Amanda Hartley		2026-05-18
Gordon Chase		2018-10-01
Mary Dowson		2019-11-04
Professor Charles Wolfe		2024-11-11
Susan May Cattermole		2026-05-18

Linked charities

- CHURCH CHARITY (211189-1)
- WILLIAM BARBER'S ALMSHOUSE (211189-2)

WILLIAM BARBER'S ALMSHOUSE CHARITY

England & Wales - Charity number 211189

Accounts



Trustees' Annual Report for the period

From Period start date 01.01.2024 To Period end date 31.12.2024

Charity name: William Barber's Almshouse Charity.

Charity registration number: 211189

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To provide almshouse accommodation for 'poor' people of New Buckenham
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	Property & grounds maintenance
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 regard to the guidance issued by the Charity Commission on public benefit

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	Maintenance of properties & grounds

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

Review of the charity's financial position at the end of the period	Para 1.21	See attached Receipts/payments account
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	EERF – for major renovation works & upgrading of properties which may be required in the future.
Amount of reserves held	Para 1.22	134,521
Reasons for holding zero reserves	Para 1.22	
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	

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	WMC payments
Investment policy and objectives including any social investment policy adopted	Para 1.46	To transfer funds to ERF/savings accounts when considered suitable.
A description of the principal risks facing the charity	Para 1.46	Major disaster
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Trust Scheme dated 31.12.1969
How is the charity constituted? (e.g unincorporated association , CIO)	Para 1.25	unincorporated
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	By advertisement in New Buckenham using local parish newsletter and local social media

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	William Barber's Almshouse Charity
Other name the charity uses	
Registered charity number	211189
Charity's principal address	38 Factory Lane Roydon, Diss, Norfolk IP22 4EG

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	Mr J Frith	Chair		
2	Mrs P Dynes	Vice Chair		
3	Mrs M Dowson			Parish Council
4	Mr G Chase			
5	Mrs A M Shepherd			
6	Prof. C Wolfe		November 2024	
7	Mrs G Goodwin		Jan – Dec 2024	
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		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

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)

--

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)

--	--

Position (eg Secretary,
Chair, etc)

--	--

Date

--

WILLIAM BARBER'S ALMSHOUSE CHARITY

**FINANCIAL STATEMENT FOR THE YEAR ENDED
31ST DECEMBER 2024**

Registered Charity Number: 211189

WILLIAM BARBER'S ALMSHOUSE CHARITY

Charity No: 211189

LEGAL AND ADMINISTRATIVE DETAILS

Trustees of William Barber's Almshouse Charity

Jon Frith

Gillian Goodwin (retired December 2024)

Pauline Dynes

Gordon Chase

Nicola King (resigned February 2024)

Mary Dowson – Nominative Parish Council trustee

Anne Marie Shepherd

Prof (Emeritus) Charles Wolfe OBE MD (Appointed December 2024)

Clerk

Jennifer Shorter

Bankers:

Lloyds Bank

Investment Funds:

M & G Securities

PO Box 9038

Chelmsford

Lloyds Bank Fixed Term Asset Account

Basis of preparation of the accounts

The accounts have been prepared on a receipts and payments basis

WILLIAM BARBER'S ALMSHOUSE CHARITY

Charity No: 211189

FINANCIAL STATEMENT FOR THE YEAR ENDED 31 DECEMBER 2024

General Fund Receipts & Payments Account

	2024		2023	
	£	£	£	£
Receipts				
<u>Income from investments</u>				
Common Investment Funds Dividends	4,737		3,630	
Common Rights, recycling donation; &E-On	45		712	
WMC payments	<u>21,430</u>		<u>18,349</u>	
Total Receipts	<u>26,212</u>		<u>22,691</u>	
Payments				
<u>Grants & donations</u>				
Christmas gifts to residents	421		388	
Gift to independent examiner	<u>150</u>	571	<u>150</u>	
				538
<u>Activities directly relating to the work of the Trust</u>				
Repairs & maintenance	1,311		12,145	
Insurance	857		1,002	
Running Costs/inspections/gardening	677		1,138	
Subscriptions/Training	267		248	
	<u>3,112</u>		<u>14,533</u>	
<u>Trust Administration</u>				
Clerk's fees & Admin	1,322	1,322	1,326	
Total Payments		5,005		16,397
Net Receipts		21,207		6,294.00
Cash funds at 1 January 2024	68,880		62,586.00	
Transfer to ERF	35,000			
Transfer to Long term savings account	<u>10,000</u>			
Cash funds at 31 December 2024	45,087		68,880.00	

WILLIAM BARBER'S ALMSHOUSE CHARITY

Charity No: 211189

FINANCIAL STATEMENT FOR THE YEAR ENDED 31 DECEMBER 2024

Statements of Assets

2024

Cash Funds

£45,087

—

M&G Charity Multi Asset

£124,521

Lloyds Fixed term asset account

£ 10,000

Freehold Property

The Almshouses, Castle Hill Road, New Buckenham
Deeds held at Spire Solicitors, Attleborough



Receipts and Payments Accounts

Charity name WILLIAM BARBER'S ALMSHOUSE CHARITY

Charity number (if any) 211189

For the period from (start date) 010124

to (end date) 311224

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					
COMMON RIGHTS/RECYCLING	45				712
WMC PAYMENTS	21430				18 349
COMMON INVESTMENT FUNDS-	4737				3630
<i>Sub total</i>	26212				22691
A2 Asset and investment sales, etc					
<i>Total receipts</i>	26212				22691
A3 Payments					
GRANTS + DONATIONS	571				538
REPAIRS/MAINTENANCE	1311				12 145
INSURANCE	857				1002
SUBSCRIPTIONS/TRAINING	267				248
CLERKS FEES + ADMIN	1322				1326
RUNNING COSTS/INSPECTIONS/	677				1138
GARDENING-					
<i>Sub total</i>	5005				16397
A4 Asset and investment purchases, etc					
<i>Total payments</i>	5005				16397
<i>Net of receipts/(payments)</i>	21207				6294
A5 Transfers between funds					
	45,000				
A6 Cash funds last year end					
	68880				62586
<i>Cash funds this year end</i>	45087				68880

Section B

Statement of assets and liabilities at the end of the period

Details		Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
B1 Cash funds	CURRENT ACCOUNT	45 087		
	<i>Total cash funds</i> <i>(agree balances with receipts and payments account(s))</i>			

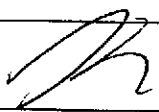
Details		Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
B2 Other monetary assets				

Details		Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	ERF	MAG CLARITY		124,521
	LLOYDS BANK SAVINGS			10,000

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 of all the trustees

Signature	Print name	Date of approval
	JON FRITH	19/5/25
P.S. Dynes.	PAULINE DYNES	19/5/25



Independent Examiner's Report on the Accounts

Section A

Independent Examiner's Report

Report to the trustees/members of

Charity Name

WILLIAM BARBER'S ALMSHOUSE CHARITY

On accounts for the year ended

3 1 1 2 2 4

Charity no (if any)

2 1 1 1 8 9

Set out on pages

(remember to include the page numbers of additional sheets)

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act), and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. 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 the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

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

- (1) which gives me reasonable cause to believe that in, any material respect, the requirements:
 - to keep accounting records in accordance with section 130 of the Charities Act;
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities 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 the brackets if they do not apply.

Signed

Carolyn

Date

26.4.2025

Name

CAROLYN HURTON

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

CHARTERED ACCOUNTANT (ACCT) (ACCT)

Address

BEECH HOUSE

NORWICH ROAD

NEW BUCKENHAM

NORWICH NR16 2AS