

THE ALMONDBURY ALMSHOUSES CHARITY

England & Wales · Charity number 223363

Details

Other names	CHARITY OF EMILY PARKIN, NETTLETON AND PARKIN CHARITY, ROBERT NETTLETON'S CHARITY (EXCLUSIVE OF EDUCATIONAL FOUNDATION)
Status	Registered
Legal form	Other
Registered	1963-10-08
Register	View on the Charity Commission register

Contact

Address 51 Penistone Road
Fenay Bridge
Huddersfield
HD8 0AW

Phone 01484603390

Activities

Objects: (1) THE OBJECTS OF THE CHARITY ARE : (A) THE PROVISION OF HOUSING ACCOMMODATION FOR BENEFICIARIES; AND (B) SUCH CHARITABLE PURPOSES FOR THE BENEFIT OF THE RESIDENTS AS THE TRUSTEES DECIDE; AND (C) THE RELIEF OF BENEFICIARIES. (2) THE LAND IDENTIFIED IN PART 1 OF THE SCHEDULE TO THIS SCHEME MUST BE RETAINED BY THE TRUSTEES FOR USE AS ALMSHOUSES.

Activities: Provision and maintenance of 21 almshouses. Provision of education grant for persons under 25 years and also relief of beneficiaries resident within the area of benefit.

Classification

- **How:** Makes Grants To Organisations, Provides Buildings/facilities/open Space
- **What:** Education/training, The Prevention Or Relief Of Poverty, Accommodation/housing
- **Who:** Children/young People, Elderly/old People

Geography

- **Area of benefit:** ALMONDBURY AND ITS NEIGHBOURHOOD
- Kirklees

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	-	-	-	-
2023-12-31	£80,342	£110,479	-	-
2022-12-31	£72,688	£54,278	-	-
2021-12-31	£74,540	£53,174	-	-
2020-12-31	£71,956	£45,257	-	-
2019-12-31	£117,199	£112,210	-	-

Trustees

Name	Role	Appointed
HILARY POLLARD	Chair	2006-08-14
GERAINT JOHN EDWARDS		2006-08-14
JOHN ROBINSON		2022-11-28
LINDA SMITH		2019-03-27

THE ALMONDBURY ALMSHOUSES CHARITY

England & Wales - Charity number 223363

Accounts



Trustees' Annual Report for the period

Period start date

Period end date

From

Day 01 01 2023

To

31 12 2023

Section A

Reference and administration details

Charity name

Almondbury Almshouses Charity

Other names charity is known by

Registered charity number (if any)

223363

Charity's principal address

51 Penistone Road, Jumble Wood

Fenay Bridge

Huddersfield

Postcode

HD8 0AW

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	Mrs Hilary Pollard	Chairman		
2	Mr Geraint Edwards			
3	Mrs L Smith			
4	Mrs J Hull			
5	Mr J Robinson		31.3.23 – 31.12.23	
6				
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Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document	Scheme of the Charity Commissioners dated 14/08/2006
How the charity is constituted	Trust
Trustee selection methods	Appointed and selected by existing Trustees

Additional governance issues (Optional information)

You may choose to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

Provision of housing accommodation for beneficiaries and such charitable purposes for the benefit of residents as Trustees decide. Relief of beneficiaries within area of benefit including distribution of up to £480 towards education of under 25's.

Trustees have achieved these objectives by provision of housing accommodation for benefit of existing residents and new residents where vacancies have arisen. Trustees have also distributed monies to local families deemed to be in need and also to six schools.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Additional details of objectives and activities (Optional information)

You may choose to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

The Charity has achieved 95% occupancy of 21 Almshouses during the current year. The Charity has also completed the work of combining three of the older Almshouses into three new properties in order to improve the accommodation for the future. The Charity had distributed £480.00 education grant to 6 local junior schools (collectively) and also £500.00 to local families.

Section E

Financial review

Brief statement of the charity's policy on reserves

Reserves held principally for the purpose of maintaining the 21 properties and keeping the same updated.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You may choose to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Income and investment funds have been maintained with approved Charity Investment Funds. Short term investments have been held in a Charity Deposit account. Principal income is derived from maintenance payments from the Almshouses.

Section F

Other optional information

Section G

Declaration

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

Signed on behalf of the charity's trustees

Signature(s)	H Pollard	
Full name(s)	HILARY POLLARD	
Position (eg Secretary, Chair, etc)	CHAIRMAN	
Date	17/04/24	



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
Almondbury Almshouses Charity

Accounting period
2023

CC16a

Receipts and payments accounts

For the period from **1.1.23** Period end date **31.12.23**

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					
Maintenance payments from Almshouses	72,524	-	-	72,524	68,198
Dividends and Interest	7,803	-	-	7,803	14,407
Communal TV	15	-	-	15	22
Ground Rent	-	-	-	-	61
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	80,342	-	-	80,342	82,688
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	80,342	-	-	80,342	82,688
A3 Payments					
Grants/water rates/insurance/council tax/maintenance	52,287	-	-	52,287	34,679
	-	-	-	-	-
Property improvements	47,023	-	-	47,023	9,111
Communal TV	22	-	-	22	22
	-	-	-	-	-
Administration/management expenses/data protection/accountancy/subscriptions/bank charges	11,147	-	-	11,147	10,466
	-	-	-	-	-
	-	-	-	-	-
Sub total	110,479	-	-	110,479	54,278
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	110,479	-	-	110,479	54,278
Net of receipts/(payments)	- 30,137	-	-	- 30,137	18,410
A5 Transfers between funds					
A6 Cash funds last year end	126,827			126,827	108,417
Cash funds this year end	96,690			96,690	126,827

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bal @ HSBC	16,721	-	-
	Bal @ COIF deposit account	79,969	-	-
		-	-	-
	Total cash funds	96,690	-	-

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

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

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	N.A.A.C.I.F (Accumulation Fund)		-	-
	ditto		-	-
	N.A.A.C.I.F (Income Fund)		-	-
	ditto		-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	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
<i>H. Pollard</i>	H. POLLARD	17/04/24



Section A

Independent Examiner's Report

Report to the trustees

ALMONDBURY ALMSHOUSES CHARITY

On accounts for the year
ended

31 December 2023

Charity no
(if any)

223363

Set out on pages

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

~~[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.~~

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination ~~(other than that disclosed below*)~~ which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

* Please delete the words in the brackets if they do not apply.

Signed:

Date:

13.03.24

Name:

JUHANNE CARTER FCA

Relevant professional
qualification(s) or body

ICAEW, INSTITUTE OF CHARTERED ACCOUNTANTS IN ENGLAND AND WALES

(if any):

--

Address:

PERMANENT, HOUSE, 1 DUNDAS STREET
HUDDERSFIELD, HD 7 2EX

Section B

Disclosure

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.

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THE ALMONDBURY ALMSHOUSES CHARITY

England & Wales - Charity number 223363

Accounts



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Trustees' Annual Report for the period

From 01/01/22 Period start date To 31/12/2022

Charity name: Almondbury Almshouses Charity

Charity registration number :223363

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	Provision of housing accommodation For beneficiaries and such charitable purposes for the benefit of residents as Trustees decide. Relief of beneficiaries within area of benefit including distribution of up to £480.00 towards education of under 25's
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	Trustees have achieved these objectives by provision of housing accommodation for benefit of existing residents and new residents where vacancies have arisen, Trustees have also distributed monies to local families deemed to be in need and also to six local schools.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Trustees have had regard to 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	n/a
Policy on social investment including program related investment	Para 1.38	n/a
Contribution made by volunteers	Para 1.38	n/a

Other		n/a

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	The Charity has achieved 97% occupancy of 20 Almshouses during the current year. The Charity has also carried out some of the work of combining a further two of the older original Almshouses in to one property in order to improve accommodation for the future, The Charity has distributed £480.00 education grant to 6 local junior schools (collectively) and also £500.00 to local families.

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	The Charity is in a sound financial position at the end of the period.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Reserves held principally for the purpose of maintaining the 21 properties and keeping same updated.
Amount of reserves held	Para 1.22	£405584
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	none

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	Income and Investment funds have been maintained with approved Charity Investment Funds. Short term investments have been held in a Charity Deposit Account. Principal income for the Charity is derived from maintenance payments from the Almshouses.
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	Scheme of the Charity Commissioners dated 14/08/2006
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	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 and selected by existing Trustees

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	Almondbury Almshouses Charity
Other name the charity uses	n/a
Registered charity number	223363
Charity's principal address	c/o 51 Penistone Road, Jumble Wood, Fenay Bridge, Huddersfield HD8 0AW

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	Mrs H Pollard	Chairman		
	Mr J Robinson		Nov 22 to Dec 22	
3	Mr G J Edwards			
4	Mrs L Smith			
5	Mrs J Hull			
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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	none
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	n/a

Additional information (optional)

Names and addresses of advisers (Optional information)

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

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

--

Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)	<i>H Pollard</i>	
Full name(s)	Hilary Pollard	
Position (eg Secretary, Chair, etc)	Chairman	
Date	31.03.23	



Receipts and payments accounts

CC16a

For the period
from

1.1.22

31.12.22

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					
Maintenance payments from Almshouses	68,198	-	-	68,198	71,054
Dividends and Interest	4,407	-	-	4,407	3,441
Communal TV	22	-	-	22	45
Ground Rent	61	-	-	61	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	72,688	-	-	72,688	74,540
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	72,688	-	-	72,688	74,540
A3 Payments					
Grants/water rates/Insurance/council tax/maintenance	34,679	-	-	34,679	28,707
	-	-	-	-	-
	-	-	-	-	14,245
Property improvements	9,111	-	-	9,111	38
Communal TV	22	-	-	22	-
	-	-	-	-	-
Administration/management expenses/data protection/accountancy/subscriptions	10,466	-	-	10,466	10,184
	-	-	-	-	-
	-	-	-	-	-
Sub total	54,278	-	-	54,278	53,174
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	54,278	-	-	54,278	53,174
Net of receipts/(payments)	18,410	-	-	18,410	21,366
A5 Transfers between funds					
A6 Cash funds last year end	108,417	-	-	108,417	87,051
Cash funds this year end	126,827	-	-	126,827	108,417

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bal @ HSBC	39,710	-	-
	Bal @ COIF deposit Account	87,117	-	-
		-	-	-
	Total cash funds	126,827	-	-

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


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

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	N.A.A.C.I.F (Accumulation Fund0	Unrestricted	-	-
	ditto	ditto	-	-
	N.A.A.C.I.F (IncomeFund0	ditto	-	-
	ditto	ditto	-	-
			-	-

	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
	H. POLLARD	31/3/23



Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name: ALMONDBURY ALMSHOUSES CHARITY

On accounts for the year ended

31 DECEMBER 2022 Charity no (if any) 223363

Set out on pages

(remember to include the page numbers of sections 2-4)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 12 2022.

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

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
the accounts did not accord with the accounting records; or
the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

* Please delete the words in the brackets if they do not apply.

Signed: Joanne Carter FCA Date: 16.03.23

Name: Joanne Carter

Relevant professional qualification(s) or body

FCA, INSTITUTE OF CHARTERED ACCOUNTANTS ENGLAND AND WALES

(if any):

--

Address:

PERMANENT HOUSE, 1 DUNDAS STREET
HUDDERSFIELD
HD1 2EX

Section B

Disclosure

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.

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THE ALMONDBURY ALMSHOUSES CHARITY

England & Wales - Charity number 223363

Accounts



Trustees' Annual Report for the period

From 1.1.21 **Period start date To 31.12.21** **Period end date**

Charity name: Almondbury Almshouses Charity

Charity registration number: 223363

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	Provision of housing accommodation for beneficiaries and such charitable purposes for the benefit of residents as Trustees decide. Relief of beneficiaries within area of benefit including distribution of up to £490.00 towards education of under 25's
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	Trustees have achieved these objectives by provision of housing accommodation for benefit of existing residents and new residents where vacancies have arisen, Trustees have also distributed monies to local families deemed to be in need and also to six local schools.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Trustees have had regard to 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	The Charity has achieved 100% occupancy of 22 Almshouses during the current year. The Charity has distributed £480.00 education grant to 6 local junior schools (collectively) and also £500.00 to local families.

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	The Charity is in a sound financial position at the end of the period.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Reserves held principally for the purpose of maintaining the 22 properties and keeping same updated
Amount of reserves held	Para 1.22	£406076
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	none

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	Income and Investment funds have been maintained with approved Charity Investment Funds. Short term investments have been held in a Charity Deposit Account. Principal income for the Charity is derived from maintenance payments from the Almshouses.
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:		Scheme of the Charity Commission dated 14.8.2006
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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	Almondbury Almshouses Charity
Other name the charity uses	
Registered charity number	223363
Charity's principal address	c/o 51 Penistone Road Jumble Wood Fenay Bridge Huddersfield HD8 0AW

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	Mrs H Pollard	Chair		
2	Mr R Nichols			
3	Mr G J Edwards			
4	Mrs L Smith			
5	Mrs J Hull			
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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	None
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)	<i>H Pollard</i>	
Full name(s)	Mrs Hilary Pollard	
Position (eg Secretary, Chair, etc)	Chair	
Date	31.03.22	



CHARITY COMMISSION
FOR ENGLAND AND WALES

ALMONDBURY ALMSHOUSES CHARITY

223363

Receipts and payments accounts

CC16a

For the period from	1.1.21		31.12.21
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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					
Maintenance payments from Almshouses	71,054	-	-	71,054	67,060
Dividends and Interest	3,441	-	-	3,441	3,770
Communal TV	45	-	-	45	45
Refunds	-	-	-	-	106
Insurance Claim	-	-	-	-	975
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	74,540	-	-	74,540	71,956
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	74,540	-	-	74,540	71,956
A3 Payments					
Grants/water rates/insurance/council tax/maintenance	28,707	-	-	28,707	28,301
	-	-	-	-	-
Property improvements	14,245	-	-	14,245	6,908
Communal TV	38	-	-	38	45
Administration/management expenses/data protection/accountancy/subscriptions	10,184	-	-	10,184	9,963
Maintenance payment refund	-	-	-	-	40
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	53,174	-	-	53,174	45,257
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	53,174	-	-	53,174	45,257
Net of receipts/(payments)	21,366	-	-	21,366	26,699
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	87,051	-	-	87,051	60,352
Cash funds this year end	108,417	-	-	108,417	87,051

Section B Statement of assets and liabilities at the end of the period

	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds			
	32,067	-	-
	76,350	-	-
	-	-	-
Total cash funds	108,417	-	-

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

	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets			
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			
N.A.A.C.I.F (Accumulation Fund)	Unrestricted	-	-
ditto	ditto	-	-
N.A.A.C.I.F (Income Fund)	ditto	-	-
ditto	ditto	-	-
		-	-

	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

	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
<i>H. Pollard</i>	H. POLLARD	31.03.22



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name

ALMONDBURY ALMSHOUSES CHARITY

**On accounts for the year
ended**

31 DECEMBER 2021

**Charity no
(if any)**

223363

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 12 2021.

**Responsibilities and
basis of report**

As the charity trustees of the Trust, 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 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 (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which 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:

Joanne Carter

Date:

17.03.22

Name:

JOANNE CARTER

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

FCA, INSTITUTE OF CHARTERED ACCOUNTANTS
ENGLAND AND WALES

Address:

PERMANENT HOUSE, 1 DUNDAS STREET
HUDDERSFIELD
HD1 2EX

Only complete if the examiner needs to highlight 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.

None

THE ALMONDBURY ALMSHOUSES CHARITY

England & Wales - Charity number 223363

Accounts



Trustees' Annual Report for the period

From 01/01/2000 Period start date To 31/12/2000

Charity name: Almondbury Almshouses Charity

Charity registration number :223363

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	Provision of housing accommodation For beneficiaries and such charitable purposes for the benefit of residents as Trustees decide. Relief of beneficiaries within area of benefit including distribution of up to £490.00 towards education of under 25's
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	Trustees have achieved these objectives by provision of housing accommodation for benefit of existing residents and new residents where vacancies have arisen, Trustees have also distributed monies to local families deemed to be in need and also to six local schools.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Trustees have had regard to 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	n/a
Policy on social investment including program related investment	Para 1.38	n/a
Contribution made by volunteers	Para 1.38	n/a

Other		n/a

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	The Charity has achieved 96% occupancy of 22 Almshouses during the current year. The Charity has also completed work of combining two of the older original Almshouses in to one property in order to improve accommodation for the future, The Charity has distributed £480.00 education grant to 6 local junior schools (collectively) and also £500.00 to local families.

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	The Charity is in a sound financial position at the end of the period.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Reserves held principally for the purpose of maintaining the 22 properties and keeping same updated.
Amount of reserves held	Para 1.22	£438355
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	none

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	Income and Investment funds have been maintained with approved Charity Investment Funds. Short term investments have been held in a Charity Deposit Account. Principal income for the Charity is derived from maintenance payments from the Almshouses.
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 <i>Trust Deed</i>	Para 1.25	Scheme of the Charity Commissioners dated 14/08/2006
How is the charity constituted? <i>Trust Deed</i>	Para 1.25	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 and selected by existing Trustees

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	Almondbury Almshouses Charity
Other name the charity uses	n/a
Registered charity number	223363
Charity's principal address	c/o 51 Penistone Road, Jumble Wood, Fenay Bridge, Huddersfield HD8 0AW

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	Mrs H Pollard	Chairman		
2	Mr R Nichols			
3	Mr G J Edwards			
4	Mrs L Smith			
5	Mrs J Hull			
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		

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	none
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	n/a

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)	<i>H Pollard</i>	
Full name(s)	Hilary Pollard	
Position (eg Secretary, Chair, etc)	Chairman	
Date	22/04/21	



Receipts and payments accounts

For the period
from

01/01/2020

To

31/12/2020

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					
Maintenance payments from Almshouses	67,060	-	-	67,060	62,305
	-	-	-	-	-
Dividends & Interest	3,770	-	-	3,770	3,852
Communal TV	45	-	-	45	23
Refunds	106	-	-	106	1,019
Insurance Claim	975	-	-	975	-
	-	-	-	-	-
Sale of accumulation fund shares	-	-	-	-	50,000
Sub total (Gross income for AR)	71,956	-	-	71,956	117,199
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	71,956	-	-	71,956	117,199
A3 Payments					
Grants/subscriptions/property maintenance/property management/water rates/insurance/council tax	28,301	-	-	28,301	25,927
	-	-	-	-	-
Property improvements	6,908	-	-	6,908	75,904
Communal TV	45	-	-	45	45
Administration/management expenses/data protection/accountancy	9,963	-	-	9,963	9,832
Maintenance payment refunds	40	-	-	40	502
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	45,257	-	-	45,257	112,210
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	45,257	-	-	45,257	112,210
Net of receipts/(payments)	26,699	-	-	26,699	4,989
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	60,352	-	-	60,352	55,363
Cash funds this year end	87,051	-	-	87,051	60,352

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bal @ HSBC	10,710	-	-
	Bal @ COIF deposit a/c	76,341	-	-
		-	-	-
	Total cash funds	87,051	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

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

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	N.A.A.C.I.F. (Accumulation fund)	Unrestricted	-	-
	ditto	ditto	-	-
	N.A.A.C.I.F. (Income fund)	ditto	-	-
	ditto	ditto	-	-
			-	-

	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
<i>H Pollard</i>	H. POLLARD	23.04.21



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
ALMONDBURY ALMSHOUSES CHARITY

**On accounts for the year
ended**

31 DECEMBER 2020

**Charity no
(if any)**

223363

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2020.

**Responsibilities and
basis of report**

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

**Independent
examiner's statement**

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 the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which 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:

Joanne Carter

Date:

31.03.21

Name:

JOANNE CARTER

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

ECA, INSTITUTE OF CHARTERED ACCOUNTANTS
ENGLAND AND WALES

Address:

PERMANENT HOUSE, 1 DUNDAS STREET,
HUDDERSFIELD
HD1 2EX

Section B **Disclosure**

Only complete if the examiner needs to highlight 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.

None