

ACKWORTH ALMSHOUSE AND RELIEF IN NEED CHARITIES

England & Wales · Charity number 225576

Details

Other names ACKWORTH UNITED CHARITIES

Status Registered

Legal form Other

Registered 1969-02-04

Register [View on the Charity Commission register](#)

Contact

Address The Meeting Room
92 Pontefract Road
Ackworth
Pontefract
WF7 7ED

Phone 07523983471

Email jprauc@outlook.com

Activities

Objects: SEE INDIVIDUAL CONSTITUENTS

Activities: Provision of residential almshouse accommodation.

Classification

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

Geography

- **Area of benefit:** PARISHES OF ACKWORTH, BADSWORTH AND FEATHERSTONE
- City Of Wakefield

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£20,166	£41,288	-	-
2023-12-31	£24,056	£14,668	-	-
2022-12-31	£20,465	£11,637	-	-
2021-12-31	£18,491	£8,345	-	-
2020-12-31	£29,203	£11,552	-	-

Trustees

Name	Role	Appointed
ANDREA ROCKETT	Chair	
Alastair Neil Lewis		2025-09-01
Alex Grant		2014-03-26
Andrew Paul Sherratt		2023-05-15
Angela Brown		2013-01-28
Ian Brown		2013-09-23
JOHN ROCKETT		2017-05-24
John Philip Rowley		
Martyn Beer		2024-04-12
Pamela Lunn		2020-02-26
Suzanne Dorcas Sherratt		2023-05-15

Linked charities

- ANN CALVERLEY (225576-1)
- MARY WHITAKER (225576-10)
- MARY LOWTHER'S HOSPITAL (225576-11)
- MICHAEL CUTTLE (225576-12)
- DAVID LINDSAY (225576-13)
- MRS SURTEES (225576-14)
- MATTHEW LAMB (225576-2)
- HENRY MITTON (225576-3)
- POOR'S ESTATE (225576-4)
- POOR'S TENEMENTS (225576-5)
- JOHN RISHWORTH (225576-6)
- JOHN WORMALD OTHERWISE WORMALL (225576-7)
- ACKWORTH MANOR TRUST (225576-8)
- HENRY WOOD HILL (225576-9)

ACKWORTH ALMSHOUSE AND RELIEF IN NEED CHARITIES

England & Wales - Charity number 225576

Accounts

The Annual Report of Ackworth United Charities (“AUC”) for the year ended 31 December 2020

Charity Details – including Structure, Governance and Management

Ackworth United Charities is the working name for a group of 14 charities. The lead charity is shown as Ackworth Almshouse and Relief in Need Charities under the Charity Registration Number (“CRN”) of 225576. The actual charities have CRNs of the same 225576 but with suffixes of 1 to 14 – from 225576-1 to 225576-14. These charities’ activities are governed by two scheme documents dated 4 February 1969 – one covering 4 charities and headed “Mary Lowther’s Hospital and others” and the other covering 10 charities and headed “United Charities and others”.

AUC’s address is The Meeting Room, 92 Pontefract Road, Ackworth, Pontefract WF7 7ED. The body of trustees comprise the following:

The Rector of St Cuthbert with All Saints, Ackworth (ex-officio)

The Headmaster of Ackworth School (ex-officio)

4 Nominative Trustees – appointed by the Parish Council of Ackworth

9 Co-optative Trustees – appointed for a period of 5 years by resolution of the body of trustees

Details of the current trustees can be found on the website of the Charity Commission. The Chairman is Andrea Rockett, the Vice-Chairman is Angela Brown and the Treasurer is John Rowley.

Purposes of Charity – including Achievements and Performance

The main activity of the first group, of 4 charities, is the provision of almshouse accommodation – in the form of the Mary Lowther Almshouses. The latter group has the same activity as regards the first 7 charities (the Almshouse Branch) – in the form of the Bradley Almshouses; the final 3 of the charities constitute the Relief in Need Branch. Its objective is to relieve residents of Ackworth “who are in conditions of need, hardship or distress.”

AUC has provided good quality housing, through its 7 units, throughout 2020. All but one of these have been fully occupied throughout this period; apart from the bedsit which became vacant on 30 September. Use was made of the period of vacancy to refurbish this property.

A small amount of relief in need income was used to provide Christmas gifts and a TV licence for our residents.

Financial Review

The financial position of AUC can be seen from the attached accounts, which were signed off on 28 October 2021, for the year ended 31 December 2020. These were the subject of an independent review – see the attached Independent Examiner’s Report.

Our accounts are prepared on a cash basis. Thus, there are no named reserves in relation to our property assets. However, in setting our annual budget – which determines the level of Weekly Maintenance Contributions payable by our residents – regard is had to the following:

Extraordinary Repair Fund (“ERF”),
Cyclical Maintenance Fund (“CMF”),
Routine Maintenance Provision (“RMP”);

at the levels recommended by the National Almshouse Association.

These sums, which are more consistent (whilst rising in accordance with any increases in building etc costs), obviously differ from the variable sums expended on Repairs etc shown in our accounts.

The 2020 accounts show a surplus of over £17K – some £14k more than in the previous year. This is explained by the approximately £4k reduction in Repairs etc plus the receipt of a £10k COVID Business Grant.

AUC’s nominal reserves, at 31 December 2020, were some £167k. However, this is based on our investments at cost. Using their market values increases this sum to approximately £283k.

J P Rowley

Treasurer

29 October 2021

ACKWORTH UNITED CHARITIES

RECEIPTS & PAYMENTS ACCOUNT FOR THE YEAR ENDED 31ST DECEMBER 2020

	2020	2019
Housing Activities		
Income:		
Almhouse Rents	£13,115	£12,982
Total	<u>£13,115</u>	<u>£12,982</u>
Less: Overheads:		
Meeting Room Expenses	£369	£530
Repairs etc	£5,908	£10,059
Gardening	£1,200	£1,120
Property Insurance	£981	£955
Water Rates	£1,450	£1,193
Secretarial Fees	£400	£400
Administration	£265	£83
Electric and Gas - 98/ 94 Pontefract Road	£35	£66
Treasurer's Expenses	£350	£350
Subscriptions	£179	£179
Accountancy	£200	£200
	<u>£11,337</u>	<u>£15,135</u>
Net (Deficit)/Surplus for the Year on Normal Housing Activities	£1,778	-£2,153
Non Trading Income		
COVID Business Grant	£10,000	£0
Listed Investments	£4,816	£4,887
Land Rents	£1,030	£1,030
Meeting Room Rents	£45	£40
Wayleave	£52	£52
Bank & Building Society Interest	£26	£27
Donations	£119	£117
	<u>£16,088</u>	<u>6153</u>
Less: Relief in Need	£215	£620
	<u>£15,873</u>	<u>£5,533</u>
Net Ordinary Surplus for the Year	£17,651	£3,380

ACKWORTH UNITED CHARITIES

BALANCE SHEET AS AT 31ST DECEMBER 220

2020	2019
FIXED ASSETS	
Housing Properties	
Cost	£148,568
Less: Housing Association	£113,638
Depreciation	£13,281
Investments at cost - Note 2	£105,814
CURRENT ASSETS	£127,463
Cash at Bank and in Hand	£39,710
- Note 3	£32,059
TOTAL ASSETS	
£167,173	
CAPITAL & RESERVES	
Designated Reserves	£15,181
Other Reserves	£134,341
Opening Balance	£151,992
Add: Surplus for the Year	£3,380
£130,961	£134,341
£167,173	£149,522
Signed on behalf of the Board:	
.....	(Chairman)
.....	Andrea Rockett
.....	John Rowley
.....	(Treasurer)
.....	(Trustee)
Approved by the Board on 2021	

ACKWORTH UNITED CHARITIES

**NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31ST DECEMBER 2020**

1. ACCOUNTING POLICIES

The financial statements have been prepared on an income and expenditure basis up to the year ended 31st December 2020. To comply with the Statement of Recommended Practice (SORP) the financial statements have been prepared on a receipts and payments basis from 1st January 2020.

2. INVESTMENTS		3. CASH AT BANK AND IN HAND		4. LAND AND BUILDINGS	
	<u>Cost</u>	<u>2020</u>	<u>2019</u>	<u>2020</u>	<u>2019</u>
				<u>Market Value</u>	
CCLA - COIF Charities	£50,000	£50,000	£65,148	£61,232	£300,000
Income Units					
M & G - Charity	£14,804	£14,804	£31,379	£33,912	£28,840
Multi Asset Fund					
Income Units					
M & G - Charibond	£10,000	£10,000	£11,470	£11,339	£45,000
Income Units					
Black Rock - Charities	£10,000	£10,000	£34,686	£37,174	
UK Equity Fund A					
Income Units					
Black Rock - Charities	£10,000	£10,000	£11,414	£10,776	
Bond Fund A					
Income Units					
Black Rock - Charities	£10,000	£10,000	£10,000	£10,776	
Black Rock - Charities	£10,000	£10,000	£11,414	£10,776	
Income Units					
Growth and Income					
Fund Class A					
Income Units					
M & G - Charity	£10,000	£0	£10,721	£0	
Multi Asset Fund					
Accumulation Units	£1,010	£1,010	£57,082	£58,958	
£105,814	£95,814	£221,900	£213,391		
Cash					
Barclays Bank Community Account					
Skipton Building Society:					
1 Year Bond (maturing on 29th October 2021)	£2,000	£2,000	£37,530	£29,610	
£180					
£449					
£29,610					
£2,000					
£32,059					
£39,710					
Almshouses - Existing Use Value as social housing ("EUV-SH")					£300,000
(this would have been £500,000 at open m.v. - per 2015 valuation)					
Land - 4.12 acres at Pudding Bush Lane (per 2014 valuation)					£28,840
Land - 4.50 acres at Manor Trust Farm (per 2014 valuation)					£45,000
(this would be £80,000 if sold to a special purchaser)					£373,840

Independent Examiner's Report

ACKWORTH UNITED CHARITIES

Report to the trustees/
members of

On accounts for the
year ended

31st December 2020

Respective responsibilities
of trustees and examiner

As the charity's trustees you are responsible for the preparation of the Accounts.
The charity's trustees consider that an audit is not required for the year under Section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is required.

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 any particular matters have come to my attention.

#

Basis of independent
examiner's statement

My examination was carried out in accordance with General Directions as 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.

#

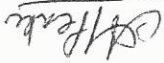
Independent
examiner's statement

In connection with my examination, no material matters have come to my attention which gives me cause to believe that 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 as 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 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



Andrew James Peaker

Name

Date 27th September, 2021

Peak Accounting Services
1 Langdale Drive
Low Ackworth
Pontefract
West Yorkshire
WF7 7PX

ACKWORTH UNITED CHARITIES

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.....	John Rowley	(Treasurer)
.....		(Trustee)
Approved by the Board on 2021		

Independent Examiner's Report

ACKWORTH UNITED CHARITIES

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Signed

Andrew James Peaker

Name

Andrew James Peaker

Peak Accounting Services
1 Langdale Drive
Low Ackworth
Pontefract
West Yorkshire
WF7 7PX

Date 27th September, 2021