

Almshouses into the next millennium

Paternalism, partnership, progress?

Jenny Pannell
with Caroline Thomas



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Tel +44 (0)117 954 6800
Fax +44 (0)117 973 7308
E-mail tpp@bristol.ac.uk
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Jenny Pannell is Visiting Research Fellow at the Faculty of Health and Social Care at the University of the West of England, Bristol. She is a housing practitioner and academic who is fascinated by almshouses. She explores their distinctive history and characteristics, examining the problems they face in adapting to the changing needs of the 21st century. **Caroline Thomas** is a housing consultant.

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Glossary

Almshouse	Dwelling, usually in a group of cottages or flats, provided by an almshouse charity for people in need under rules laid down under their charitable 'Scheme'. Also sometimes used to describe historic almshouse buildings, even if no longer used for their original purpose.
Almshouse charity	Charitable organisation providing almshouses, prevented by its rules from granting tenancies under the 1985 Housing Act.
Almshouse resident	Person who occupies an almshouse dwelling as a beneficiary of the charity; this term is now generally used by the almshouse movement in preference to archaic expressions such as 'almsperson' or 'inmate', although such terms sometimes survive in the formal rules if they have not been updated.
Almshouse Association	National body which represents nearly all almshouse charities, and which advises member charities, promotes new almshouses, encourages renovation, reviews legislation and represents members' views to government and quasi-governmental organisations such as The Housing Corporation and the Charity Commission (ie, fulfilling a similar role to the National Housing Federation for housing associations).
Housing Association Grant (HAG)	See Social Housing Grant (SHG).
Registered Social Landlord (RSL)	Generic name for housing associations and other landlords registered with The Housing Corporation following the implementation of the 1996 Housing Act.
Social Housing Grant (SHG)	Housing capital grant given by central government to RSLs to provide social rented housing since 1974 (previously known as Housing Association Grant or HAG), paid via either the local authority or The Housing Corporation; renamed Social Housing Grant since the implementation of the 1996 Housing Act.
Social (rented) housing	Housing provided by local authorities, housing associations or other RSLs.
Scheme	Formal name for set of rules governing the formation and operation of an almshouse charity.

Sheltered housing

Groups of self-contained flats or bungalows providing housing for older people, with or without a warden or central alarm link, sometimes also providing additional communal facilities, for example, common room, guest room, laundry.

Trustees

Almshouse charity's governing body, equivalent to a housing association board.

Introduction and policy context

Almshouses provide housing in cities, towns and villages all over England for over 30,000 people. The buildings are often of distinctive architectural styles and in convenient central locations. The almshouse is frequently cited as the forerunner of the housing association movement and the originator of the concept of sheltered housing for older people (Cope, 1990; Parry and Thompson, 1993; Best, 1997).

Many almshouses display characteristics of good design, such as village or town centre locations, courtyard layouts, and small developments integrated into rural or urban communities. However, like other sheltered housing, some almshouses are no longer suitable for older people because of their location, buildings, or local over-provision of older people's housing. In such circumstances they may be more appropriately used for younger people in need of housing. Empty or under-used almshouses can represent a valuable resource for local communities, and their restoration can improve the urban or rural environment.

To lovers of historic buildings and students of architectural history, almshouses are a fascinating guide to the history of domestic buildings and worthy of preservation, whatever the cost. To housing professionals and academics, however, they are too often looked on as a backwater, overtaken and overshadowed by the development of council housing and housing associations. Over many years, housing research has ignored them, and numerous surveys of housing association or older people's housing have explained that almshouses have been omitted because they are considered insignificant or too difficult to access (see, for example, Housing

Corporation/Building Research Establishment, 1979; DoE/Welsh Office, 1979; Tinker et al, 1995).

The word 'almshouse' evokes a variety of images. To the romantics, almshouses seemed the epitome of old England: pretty cottages in idyllic village locations, or handsome buildings round courtyards in cathedral cities, maintained over the centuries by caring people with a sense of duty to those in need. To social reformers, they reflected the problems of the days before the coming of the welfare state: paternalistic, anachronistic, run by the local 'squirearchy', with no role in a modern society. Following the introduction of the welfare state by the post-war Labour government, the almshouse movement feared municipalisation and even abolition (Howson, 1993, p 165).

Fifty years on, in an age of welfare pluralism, they offer an alternative to other forms of social or private rented housing. Like other housing organisations, the almshouse movement faces new challenges moving into the next millennium. Unlike other housing organisations, the almshouse movement already carries in its ethos nearly a thousand years of history: as the director of one almshouse trust put it,

"... a sort of spiritual role and service, centred round a special place ... we have a fifteenth century chapel... The Trust has been going for a thousand years, and we plan to be continuing for another thousand years.... Recently we held a seminar for trustees for the way ahead in the twenty first century." (Director, Gloucester Charities Trust)

Almshouse residents are also changing. As the almshouse movement itself acknowledges, they will

have:

“... higher expectations than their predecessors, enjoy a better standard of living and will look for modern, spacious and well-designed housing. These are some of the challenges facing charities today.” (Lady Benson, Chairman, Almshouse Association, 1998, p 1)

This report considers what role almshouses may play in current and future housing and welfare provision. It examines and discusses the strengths and weaknesses, problems and opportunities of almshouses as a form of housing provision. Although there are a number of books on the historical and architectural aspects of almshouses, this is the first to explore their role in housing provision and social policy.

The report shows what can be done to make the best use of what are often beautiful and historic buildings, in ways which both follow the wishes of the original benefactors to provide housing for people in need, and adapt to modern ideas on housing design, development and management. It describes the range of strategies and funding sources available, and explores the scope for creative partnerships between almshouse charities, local authorities, housing associations and others.

It is of particular interest to housing professionals and policy makers seeking to maximise the use of housing stock to meet the need for housing in local communities. It aims to be of practical use to almshouse trustees and staff, and to councillors, board members and staff of housing associations and local authorities. It also fills a gap in the material available to students of social and housing policy.

The changing policy context

This chapter discusses the changing policy context within which almshouses are operating in the late 20th and early 21st centuries.

From their foundations in the early medieval period until the mid-19th century, almshouses were one of the only forms of housing available to poor older people. They appear to have been regarded as the most appropriate model by a succession of founders over many centuries: monasteries and bishops, royalty and aristocracy, mercantile guilds,

19th-century philanthropists and trade benevolent societies. By the mid-19th century, alternative models of housing provision for all age groups were developing, such as Model Dwellings and Industrial and Provident Societies (Burnett, 1986). By the early 20th century, council housing was growing, to become the prevalent form of housing for lower income groups throughout most of the century, with over 30% of the population living in council housing by 1979 (Cole and Furbey, 1994).

Despite the development of the welfare state in the mid-20th century, and the acknowledged need of everyone for shelter, housing has never enjoyed the same degree of support for universalist provision as, for example, healthcare or education. It was “never fully legitimised as part of the welfare state” (Mullins and Niner, 1997, p 175).

While council housing was still dominant in the 1970s, after the 1974 Housing Act the housing association movement started to receive significant public funding, although for both housing associations and those almshouse charities which registered to gain access to funding,

The introduction of large-scale public subsidy compromised to some extent the independence of the [voluntary housing] movement, as inevitable bureaucratic controls were imposed in a kind of quid pro quo for the receipt of public funds ... which brought expansion, but it also marked the end of an era of reliance upon largely voluntary effort and charitable donations. (Cope, 1990, p 12)

Since the mid-1980s, housing, like other aspects of public policy and welfare provision, has become more fragmented and diversified, with a wider role for the private and voluntary sectors. In housing this has meant a growth in the provision of housing association dwellings and an emphasis on the enabling role of the local authority, working in partnership with other providers (Williams, 1997).

This has led to recent interest in a range of issues in housing policy, all of which impact on almshouse charities, as is seen in subsequent chapters:

- governance and accountability
- tenant/citizen/consumer rights
- partnerships and multi-agency working.

More specifically, debate on housing for older people

has focused on the effect of policies on Care in the Community and the impact of an ageing population on housing need and demand, and housing choices (Means, 1997). There has been a questioning of established 'traditional' forms of provision such as sheltered housing, the development of hybrid forms of housing with care, and an exploration of the new problem of 'difficult-to-let' sheltered housing with the recognition that there may be over-provision in some areas (Tinker et al, 1995).

It is within this complex policy context that we must consider what role almshouses may have to play in the future provision of housing and care for both older people and, in some cases, others in need of good quality low-cost housing.

Structure of the report

In the first part of the report, Chapter 2 defines the nature of almshouses, including a brief history (which is essential to understand the distinctive characteristics of almshouses), their funding and regulation, and their current level of activity, set within the wider context of social housing.

Chapters 3, 4 and 5 identify current problems and issues facing almshouse charities and their partners, and almshouse residents.

In the second part of the report, Chapters 6 and 7 draw on a number of examples of almshouses which are successfully adapting to changing times. These almshouses have been chosen because they illustrate solutions to some of the problems and issues highlighted in earlier chapters. They also point up lessons for the future, which are further developed in the final chapter. This considers the role of almshouses and the potential for partnerships, looking forward to their role in the 21st century and the next millennium.

The research study

The research on which this report is based included visiting a number of case studies, examining statistical and documentary material from almshouses and their funders, and interviewing people within the almshouse movement including the Almshouse Association, residents, trustees and staff at almshouse

charities and, more widely, staff in social housing organisations working with almshouses.

The original research was funded by an 'Innovation and Good Practice Grant' from The Housing Corporation South West Regional Office. For this reason, most of the almshouse charities used as examples come from the South West and are either registered with The Housing Corporation or have links with registered housing associations. However, the range of almshouses visited (size, scale, location, type of resident) is broad, covering large and small almshouse charities in city centres, towns, villages and very rural locations, so the findings are appropriate to almshouses all over the country. More details of the research methodology can be found in the Appendix.

Defining the nature of almshouses

In search of almshouses

This chapter sets the scene for the rest of the report. It places almshouses within the historical and contemporary context of the development of social rented housing. The chapter answers the following questions:

- What is the definition of an almshouse?
- Why and when were almshouses founded? What is it from their history which gives them their distinctive philosophy?
- How are almshouse charities regulated?
- How are they are constituted and managed?
- How many almshouses exist and who do they house?
- What are the distinctive features of their housing design?
- How are they funded?

What is an almshouse?

One of the difficulties in writing about almshouses is the problem of definition.

Many people's image of almshouses is of the buildings, which often have a distinctive architectural style. However, an unknown number of almshouse buildings have been sold on for other uses and are now used as private homes, museums, cafes, shops or offices, so can no longer be considered to be almshouses except in terms of the history of the building. Examples include Nappers' Mite in Dorchester (now shops and a café) and the almshouses in Moretonhampstead on Dartmoor (owned by the National Trust).

Almshouse charities now manage a variety of both ancient and modern housing: the oldest buildings date back to the 12th century, the most recent have been built in the 1990s. All this housing is inhabited by people who used to be known as almspersons, the preferred modern term being almshouse residents. What unites all these residents and their housing is their legal position as beneficiaries of a charity rather than as tenants, a point discussed in detail in Chapter 5.

Some almshouses are no longer managed by almshouse charities, but still provide housing for people on low incomes. As in a number of the examples in later chapters, they have been leased (or occasionally sold) to other charities or housing associations, or are managed by them. It is a matter of debate as to whether these should remain classified as almshouses. Of those interviewed for The Housing Corporation research, some people considered that they were no longer almshouses if they were not still both owned and managed by almshouse charities. Others felt that these almshouses were still fulfilling the spirit of the wishes of the original benefactor because they continued to provide housing for those in need, and so they could still be considered to be almshouses.

The working definition of an almshouse used in this report is of housing provided by an almshouse charity, or by other social landlords in an almshouse building.

How, when and why were almshouses provided?

It is essential to understand something of their origins to explain the differences between almshouses and other housing explored in later chapters, and to understand how their history results in their present distinctive character. However, it is beyond the scope of this report to provide more than a brief account of the historical origins of almshouses. For more detailed information, Howson (1993) contains a wealth of information on their social history, as well as on design.

The motives and origins of the founders of almshouses are extremely diverse, and reflect English social history and the development of charitable involvement in welfare provision over the past thousand years. Almshouses are but one example of church and charitable involvement in the provision of schools, universities, healthcare and hospitals as well as housing.

Such involvement predates social welfare provision by the State, in both England and much of Western Europe. It is only during the 20th century that such voluntary sector provision has changed to a complementary role, working in partnership with the State in what is now described as welfare pluralism.

The oldest almshouse charities still in existence date back to the 12th century, but new almshouse charities have continued to be founded during every century of the millennium, right up until the 1990s. The almshouse, from medieval Hospital to 19th-century philanthropy, has been inextricably linked to the social fabric and religious beliefs of its period. Their founders include:

- monasteries and convents
- medieval religious guilds
- bishops and other clerics
- kings and queens
- members of the aristocracy
- landowners and the gentry
- craft guilds, livery companies and similar mercantile societies
- town corporations and boroughs
- charities set up for the relief of poverty or following disasters

- merchants and industrialists
- regiments
- trades unions
- benevolent societies and associations
- quasi-public bodies such as Trinity House.

The names of almshouse charities reflect this varied history. Examples include:

- The Hospital of Jesus or Archbishop Hutton's Charity
- The Almshouses of Countess De La Warr
- The Duchess of Somerset's Hospital
- The Legg Whittuck Charity for Aged Servants
- The Fishermen's Hospital
- The Barlow and Ellyett Homes for Aged Women
- The Royal Watermen and Lightermen's Asylum
- Durham Aged Mineworkers' Homes

Medieval origins and the links with monasticism

The oldest English almshouses still in existence date back to medieval times, and their origins date back even further. In 816, the Synod of Aix set out the tenets of the 'new monasticism'. This included the obligation on monasteries to distribute 'alms', defined as food, clothing, medicine, board and lodging, sometimes education but only occasionally money.

Following the Norman conquest of England in 1066, land seized by the Normans was used to endow monasteries. Thus some of the earliest medieval almshouse foundations were linked to the Roman Catholic church and monasticism. The first examples of the almshouse were provided by monks and nuns, in premises adjoining or near to their monasteries and convents, where they provided food, board and lodging, and care to travellers, pilgrims and poor people.

Medieval almshouses were often called Hospitals, providing shelter (or 'hospitality') for the poor and homeless. Many keep the name 'Hospital' to this day, such as the Hospital of St Cross at Winchester, probably the oldest English almshouse still in existence, founded in 1136. An even older Hospital in York, no longer in existence, was founded by Athelstan, a Saxon king, in 986.

Some of these almshouse-Hospitals had a specialist role as leper-houses, founded to care for people suffering from leprosy, which was prevalent in England in the Middle Ages. Sherburn Hospital, County Durham, is still an almshouse and dates back to 1181 when it was founded by the local bishop to provide care for 65 leprosy sufferers.

Members of the clergy, royal and aristocratic benefactors, and local landowners founded almshouses as part of their duty to provide for the poor and to set an example in charitable works. Like other works of charity, the provision of almshouses by such patrons was something of an insurance policy for the after-life, so almshouse residents were often expected to pray for their benefactors in the on-site chapel; attendance at services remains a requirement in some almshouses to this day.

Religious guilds and fraternities (which were a type of medieval friendly society) also provided almshouses for their members, as well as other services such as burials and prayers for the dead.

The Reformation, the rise of mercantilism and the Elizabethan Poor Law

With the Reformation came the dissolution of the monasteries and the suppression of practices associated with prayers for the dead such as chantries and religious guilds. Many of the Hospitals which had previously been linked to monasteries or to religious guilds were destroyed. However, some were saved and restored: some were reprieved during the reign of the Catholic Queen Mary, while others were taken over by the municipality. One such example is the almshouses in Poole, Dorset, founded by the Corpus Christi Guild but saved by the burgesses of Poole in 1550 and still in use as almshouses to this day.

The 16th century also saw the change from medieval society to the modern age, with an expansion of trade, and the growth of the mercantile class. The London livery companies and individual merchants endowed many of London's almshouses during this period, often for older people linked to specific trades such as skinnners, drapers, and haberdashers. In Bristol, the Society of Merchant Venturers (featured in Chapter 6) established almshouses for merchant seamen. Many almshouses still retain their links to

specific trades and to the livery companies.

The late 16th century also saw an overhaul of the social welfare system with a range of measures culminating in the 1601 Poor Law, which provided a framework that remained in force until the 1830s. Parishes had to provide for their own poor, with a Poor Rate and local overseers. Some parishes provided a Poor-house or almshouse (as at Yatton in Somerset, described in Chapter 6); in some cases these were existing buildings, previously Hospitals, now under new management.

The Elizabethan Poor Law also codified the concept of the 'deserving' poor, with their link to a particular parish, and the 'undeserving' poor who were effectively excluded from help. Almshouses were generally for the 'deserving' poor. Their rules frequently specified that almspeople had to be 'of good character', and some rules specifically excluded people in receipt of Poor Law parish relief (an early equivalent of Income Support).

Following the Reformation, almshouses lost their links with the Roman Catholic church. However, this was often replaced with a connection with the Church of England. Membership of the Church of England (or less frequently, another denomination) is still a requirement for admittance to many almshouses.

By the 18th century and the rise of nonconformity, almshouses were also founded for members of the nonconformist churches: look, for example, at the rules of the Wakefield almshouses, founded in 1840:

The almshouses were to be occupied only by 'Christian dissenters from the Church of England, of any denomination but Roman Catholics' ... the twelve governors [trustees] ... were recruited from the largest dissenting churches situated within a mile of Wakefield's market cross ... those chosen had to affirm that they had never in the past been or would ever in the future be a member of the Church of England or 'profess or act in support of those opinions or politics which are commonly called Tory or Conservative'. (Howson, 1993, p 144)

The Victorian era

The Victorian period has been described as 'the last great age of almshouse building' with over 600 groups of almshouses built during Queen Victoria's

reign, many of these arising from “an ethical standard which was almost puritanical in its outlook [which] found its outlet in philanthropy and schemes of social reform calculated to mitigate the evils of the new industrial society without changing them” (Howson, 1993, p 137).

Following a series of scandals, concern at corruption in the running of almshouses and other charities led to the formation of the Charity Commission in 1855. Trollope’s novel *The warden* is a fictional account of the misappropriation of almshouse funds, supposedly based on the Hospital at St Cross, Winchester.

As in previous centuries, individual benefactors continued to found almshouses, but they were increasingly provided by charitable organisations too. By the late 19th century and the early 20th century, alternative constitutions, organisations and legal entities for organisations wishing to provide housing and other welfare services were being developed. Voluntary organisations such as the Model Dwellings Societies and Industrial and Provident Societies aimed to house the ‘working classes’. These were the forerunners of today’s housing associations (Cope, 1990, p 9). The same period also saw the development of the first council housing (Burnett, 1986), which became the dominant model of social rented housing in Britain from 1919 onwards.

However, a number of housing organisations founded in this period chose to constitute themselves as almshouse charities rather than as Industrial and Provident Societies, particularly if they were housing older people. Presumably this was because the almshouse charity was a familiar model, well known to the founders of these new housing organisations, and particularly associated with models of housing for older people.

Many of these foundations were for workers from specific occupations. They were founded by trades unions, as well as benevolent societies and employers. Examples include almshouses for retired staff founded by the National Union of Marine Aviation and Shipping Transport Officers, and for seamen and fishermen in various ports. There are also a number of almshouses provided by organisations such as the Bakers Benevolent Society, as well as those for men (or their dependents) from various regiments such as

the Royal Norfolk Regiment Memorial Cottages in Kings Lynn.

Some of these 19th-century foundations remain among the largest of almshouse charities. Examples include the Durham Aged Mineworkers’ Homes Association (DAMHA), founded in 1898, still constituted as an almshouse charity and managing over 1,200 dwellings.

Another large charity is the Licensed Victuallers’ National Homes, which originated in the early 19th century, hence its almshouse charity constitution, but whose main expansion dates from the 1950s onwards. Using charitable funds and, later, grants from The Housing Corporation, this national housing organisation, still constituted as an almshouse charity, now provides over 600 dwellings in sheltered housing all over the country for retired people from the pub trade.

Almshouses founded in the 20th century

Despite the dominance of council and housing association provision during the 20th century, almshouses have continued to be founded, albeit at a much reduced rate. These include a number of war memorial homes, such as those at Lydney in Gloucestershire (built after the First World War). North-East Railway Cottage Homes, now known as the Railway Housing Association and Benefit Fund, was founded in 1921 for widows and orphans of railway workers killed in the First World War and provides over 1,300 homes. It was originally constituted as an almshouse charity, but has granted tenancies since it registered with The Housing Corporation in 1976 and considers itself as a registered social landlord (RSL), not an almshouse charity.

Whiteley Village in Surrey is a whole village of almshouses built from 1911 onwards, providing housing and other facilities for hundreds of retired employees of a large London department store, Whiteley’s, which has since closed.

The Collins Memorial Trust, at Chandlers Ford near Southampton, is an almshouse trust founded by Herbert Collins in 1939. The Collins family was also involved in the origins of Swaythling Housing Association (which provides family housing), but chose the model of an almshouse charity when they

built housing for older people. Three groups of flats and bungalows were built in 1939, 1959 and 1973, providing 50 dwellings for retired people with no public funding. Hanover Housing Association now act as corporate trustees.

There have also been some very recent foundations. A new almshouse charity was created in 1985 in Cornwall. This is at Tresillian, near Truro, where, following the tradition of landowners in the past, the Boscawen family has gifted land for eight almshouses to house retired workers on their estate. However, at the time of the research, the almshouses had not yet been built because of unresolved planning issues.

A local benefactor in Totnes, Devon, left money to found a new almshouse charity in memory of a brother who was killed during the war. The three newly built two-bedroom houses in the town centre for active elderly residents from the area were completed in 1996.

During this century, some almshouse trustees have shown concern for their image, and even for the name 'almshouse' itself. Penrose Almshouses in Barnstaple, founded in the early 17th century, even dropped the name for a few years:

... a fascinating debate took place in 1942 when one of the Trustees put forward the suggestion that the word 'Alms' be dropped from the name of the properties and that they should simply be known as 'Penrose Houses'. This was put before the Committee who voted to adopt the change of title and the minute book for the following few years, dutifully refers to 'houses' not 'Almshouses'. By 1945/6 the old title makes an occasional, presumably accidental appearance in the records. By late 1946 this early attempt at Political correctness seems to have been completely dropped without formal debate and the title 'Penrose Almshouses' reinstated. (Savage, 1995)

The Almshouse Association had its origins after the Second World War, when 37 representatives of London almshouse charities and City Livery Companies formed the London Association of Almshouses in 1946 (Almshouse Association, 1996/97, p 5). The war had destroyed many almshouses and there was a fear that the coming of the post-war Labour government and the welfare state would lead to the municipalisation of almshouses. A committee was formed:

... to safeguard the interests of almshouses and to promote the welfare of beneficiaries in view of the proposed changes of legislation. (Howson, 1993, p 165)

Who regulates almshouse charities?

All almshouse charities are registered charities (ie, registered with the Charity Commission), so all are regulated by the Charity Commission. The 1993 Charities Act is the principal statute. The Charity Commission maintains the public register of charities on which information appears about every registered charity. Charities are required to keep proper books and accounting records, to make them available to the public, and to submit annual accounts, reports and returns to the Charity Commission. There are exceptions for charities with a very small turnover, but this would only apply to almshouse charities with very few dwellings. The Charity Commission also recommends appropriate internal financial controls.

The most important regulatory roles which affect the almshouses discussed in this report concern changes to the charity's governing instrument (the Scheme or rules), and disposals of land and property. Although some almshouse charities have rules which allow minor amendments, these do not usually allow the charity to change its own charitable purposes. So an almshouse charity which wants to allow younger residents, where the Scheme has an age limit, or couples where the Scheme says the almshouses are for one gender only, will have to seek the agreement of the Charity Commission. The same usually applies to leasing or selling land or buildings, even if to another charity or housing organisation.

Only a minority of almshouse charities have also registered with The Housing Corporation as RSLs (a term which covers housing associations and any other housing organisation which the Corporation will register). In the rest of the report, a distinction will be made between almshouse charities which are RSLs and those which are not. Registration with the Corporation was usually in order to attract grant for new-build, refurbishment or major repair projects. In 1997, 604 almshouse charities were registered with The Housing Corporation. Of these,

a third registered during the first year after Housing Association Grant (HAG) became available (1975–76) and three quarters were registered by 1982 (Pannell, 1982). Only 30 were registered between 1989 and 1997 (Cope, 1990, p 28 and information from The Housing Corporation).

Like other small housing associations, many almshouse charities have been deregistering, as a way of escaping what are seen as the Corporation's excessively bureaucratic requirements, which can bear particularly heavily on small charities with no paid staff and only voluntary trustees. In response to this criticism, accounting requirements for small organisations were also relaxed with effect from 1 April 1997. Subject to certain criteria, the 1996 Housing Act allows small housing associations which had received less than £1m of public money to deregister (Housing Corporation, 1996). By March 1999, 97 almshouse charities had been deregistered.

Who runs almshouses?

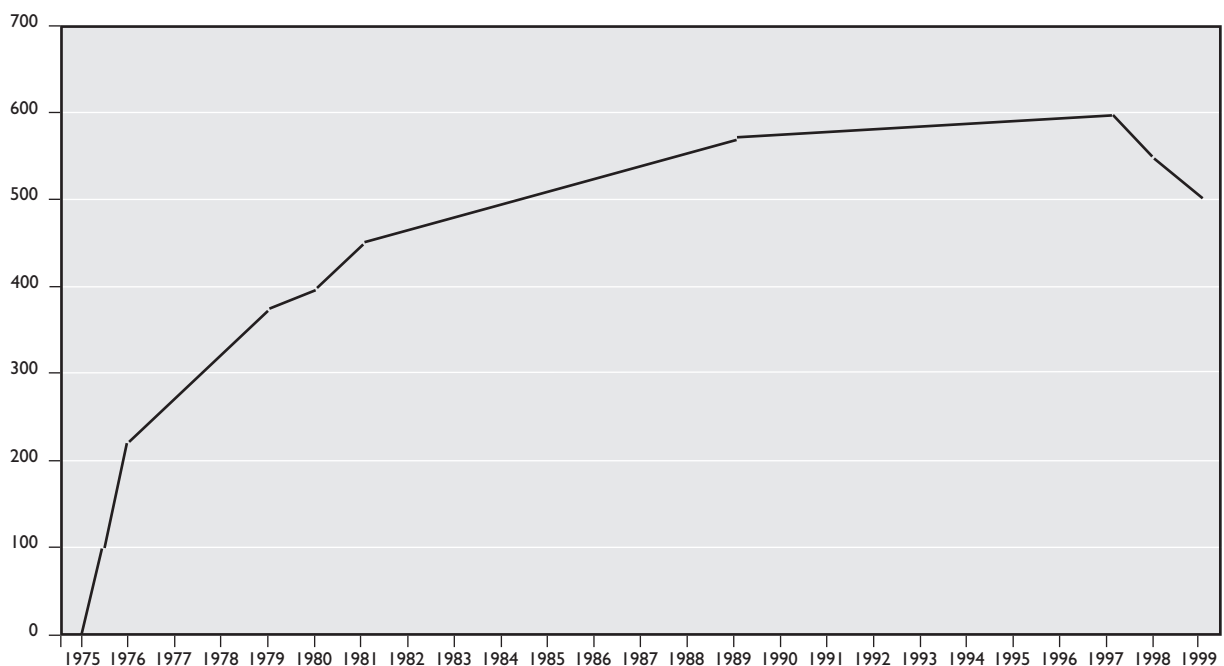
Most almshouses are still run by almshouse charities; the charities are governed by their 'Scheme', and must abide by the rules which set out the criteria for the appointment of trustees, the investment

of funds and the management of the almshouse (including such matters as resident selection). The rules reflect the wishes of the founder(s) and so the spirit of the medieval, Tudor and Stuart, 18th-century or Victorian 'world picture' of the founders can live on in housing provided in the late 20th century. In today's language, the founders remain as 'stakeholders' to the present day, and the current trustees are obliged to consider the wishes of the benefactor. This will still apply, even if the housing itself is more recently built. This is one of the main distinguishing features of almshouses and is discussed in more detail in Chapter 5.

As with other voluntary organisations and charities, almshouse trustees receive no payment. They fulfil a similar role to housing association board members but, as in small housing associations, may play a more active role in housing management, especially where there are no paid staff. There are often only a few trustees, or even a sole trustee (although the Almshouse Association recommends a minimum number of five).

Some people have the right to be trustees of the almshouse charity by virtue of their position. This may be the local vicar (reflecting the links with the church described above), the local landowner, or a

Figure 1: Almshouses registration/deregistration as RSLs (1975-99)



descendant of the founder. Sometimes, especially for municipal or town charities, the Scheme provides for a specified number of nominees from the local council; these can be councillors or other people with an interest in housing.

In the past, there have often been no age restrictions or limits to term of office for almshouse trustees. Some trustees have held their position for decades, sometimes into extreme old age; in one almshouse featured in this report, one of the previous trustees had been over 90 years of age. The Almshouse Association now recommends that almshouse charities should have fixed periods of trusteeship and a regular turnover of trustees (Almshouse Association, 1998, p 10), but further research would be needed to ascertain how many almshouse charities have been able to follow this recommendation. As with other voluntary organisations, it is not always easy to recruit people with the necessary skills, time and energy.

There has been a tendency for amalgamation of almshouse groups, which is reflected in the fact that 1,729 member charities manage 2,288 groups of almshouses. However, the tendency towards merger and amalgamation among housing associations, so marked in recent years, has so far been much less prevalent among almshouse charities. A number of research respondents felt that this was the way forward for almshouses in the 21st century.

Some of those which have already amalgamated are municipal charities, identifiable by names such as Taunton Town Charities and Bristol Municipal Charities, which act as umbrellas for a number of different charities (and not just almshouses); others have amalgamated for administrative convenience.

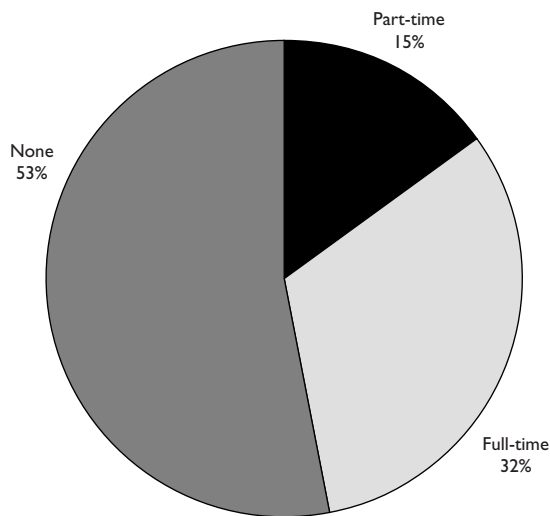
One such example visited for this research is the St Petrock and Heavitree Parish Lands Charity, which administers six different almshouse charities in Exeter, with different rules and separate accounts; various charities have joined the group over the years, as trustees have died or become too old to carry on. The clerk to the trustees is a solicitor based in a nearby town. Some housing associations also act as 'corporate trustees': for example, Hanover Housing Association acts in this way for six groups of almshouses.

Many almshouse charities, especially the smaller ones, have no paid staff and the trustees take an active role in day-to-day management. Larger charities will have one or more full-time member of staff. All almshouses have a clerk to the trustees, whose duties include administration, fulfilling the requirements of the regulatory bodies, finance (including managing substantial investments in some cases) and housing management and maintenance. Smaller charities may pay a fee or honorarium to their clerk; larger charities have salaried staff.

Clerks are frequently local solicitors or surveyors, and some carry out this role for a number of almshouse charities; in such cases, other staff in their professional practice are likely to assist in running the almshouse charity. In one example from the research, the solicitor's secretary was the main point of contact for housing management and maintenance issues. Some almshouse charities employ wardens, and a few employ care and nursing staff. In July 1994, a survey of Almshouse Association member charities showed 684 groups of almshouses with wardens on site or visiting, and about 40 almshouse charities providing extra-care housing or full residential or nursing care (Almshouse Association, 1994).

A recent analysis of almshouse charities which are RSLs shows that 270 have paid administrative staff and 111 have paid care staff. Most larger charities have paid staff but few of the small ones do, and smaller charities often employ only one part-time staff member. In Figure 2, the almshouses with paid staff are divided into those with less than one FTE (full-time equivalent) staff member and those with one or more FTE staff.

Figure 2: Almshouses with staff



This analysis, and other data on almshouse RSLs in this chapter, is based on returns to The Housing Corporation from 560 almshouse RSLs in 1998.

How many almshouses are there?

According to the Almshouse Association (which represents and provides advice to the majority of almshouse charities), their 1,729 member charities manage 2,288 groups of almshouses, with over 32,500 almshouse dwellings in current use, housing older people and others in housing need. Given that a number of almshouse dwellings are inhabited by couples, and a few by families, almshouse charities probably house at least 35,000 people.

Although almshouses do not provide many dwellings (especially when compared with local authorities and housing associations), their importance is not because of their scale and size, but because they have other things to offer. In particular localities they may provide the only rented dwellings for older people (as in some villages), or occupy particularly convenient and attractive sites in central locations in towns or cities which would not generally be available to people on low incomes.

Figure 3: Almshouse Association member charities: number of dwellings

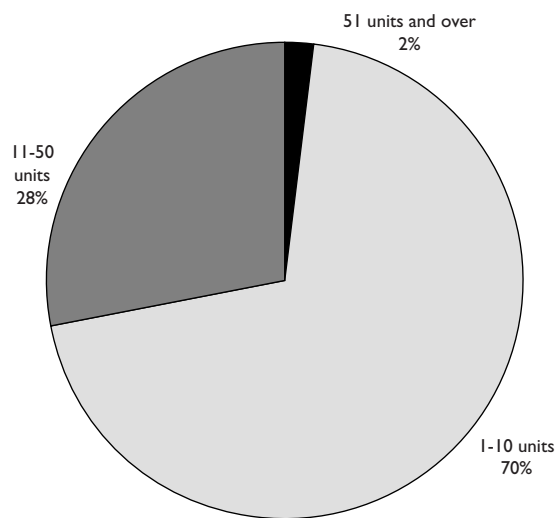
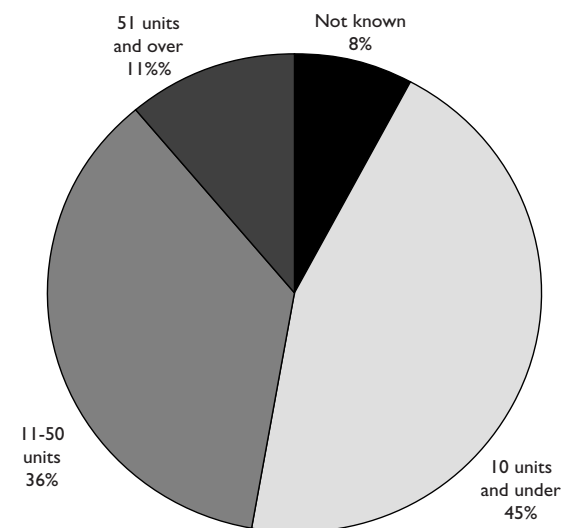


Figure 4: Almshouses which are RSLs: number of dwellings



Although there are a few larger almshouse charities, they are all very small compared with most housing associations. Of the Almshouse Association's 2,288 groups, only 54 groups manage more than 51 dwellings and 70% of groups manage 1 to 10 dwellings. A comparison of Almshouse Association members with almshouse RSLs suggests that more of the larger almshouse charities are RSLs, because of the 560 almshouse RSLs analysed, only 45% manage 1 to 10 dwellings and 11% manage over 51 dwellings. It is likely that most of the non-

respondents are also smaller charities.

Who lives in almshouses?

There is very little published data available on almshouse residents classified by age, gender, race or other characteristics, and this is an area which would repay further research. The information in this section comes from anecdotal evidence from trustees and staff, and from observation during visits to almshouses.

Most almshouse residents are older people, generally defined as either over 60 or over state pension age (currently 60 for women, 65 for men). As in other older people's and sheltered housing, the majority of residents are female and there are few couples.

Unlike social rented housing, some almshouses are exclusively for men or for women. Some are almost monastic in their ambience, in such matters as a requirement for regular attendance at services in the chapel. In a few almshouses, residents have to wear a special form of dress or uniform: examples include the Brothers at St Cross Hospital, Winchester, and the Chelsea Pensioners (because London's Royal Hospital, Chelsea is an almshouse). Adherence to a particular faith or denomination, or connection with a local parish or a specific trade or occupation, is frequently a criteria for eligibility. This, and other resident criteria specific to almshouses, is discussed in more detail in Chapter 5.

Almshouses may sometimes provide housing for people under pension age, and occasionally for families and younger people, as reflected in some of the examples in Chapter 6. A few almshouses were either specifically provided for, or usually occupied by, families throughout their history. Examples include Shrewton Flood Charities (a Victorian disaster relief charity in Wiltshire), and the Yatton church house (a 15th-century building in Somerset).

Although most almshouse charities have traditionally housed older people, many have found that their rules make no mention of age as a criteria for residence. Where the building is no longer appropriate for older people, then middle-aged or young people now live in the almshouses. Even where age is mentioned in the rules, it is often

well below the current state pension age (as people became old by 40 or 50 in previous centuries). If a minimum age is specified, some almshouse charities have been able to change their rules on age (and sometimes other qualifications) with the agreement of the Charity Commission.

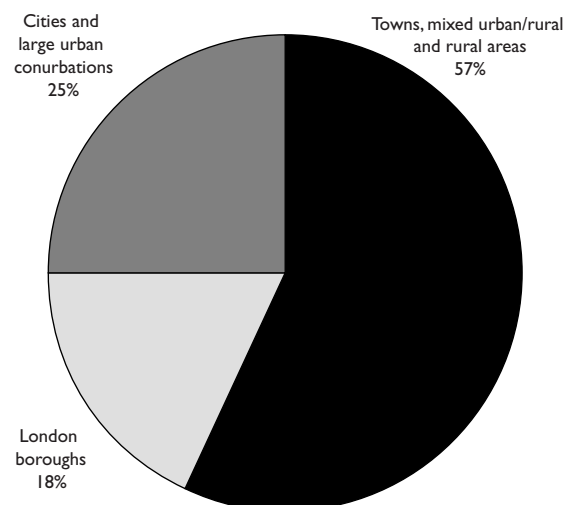
Where are almshouses located?

In the United Kingdom, almost all almshouses are located in England. Because of their different social and ecclesiastical history, there are very few almshouses in Wales, and almost none in Northern Ireland or Scotland. All the material in this report refers to England only.

It is often assumed that the majority of almshouses are rural, or in small towns. However, there are substantial numbers of almshouses in urban and industrial areas, dating back to the rise of the mercantile class in the 15th and 16th centuries, together with many foundations dating from the Victorian era.

It is problematic defining 'urban' and 'rural' locations from either postal address or local authority area. There are some areas which are quite clearly urban, but many other areas are mixed, and very few are exclusively rural. However, an analysis by local authority area can reveal the extent of almshouses in urban areas. Assumptions can then be made about the proportion of almshouses in rural areas.

Figure 5: Geographical distribution of almshouse stock



Almshouse RSL returns to the Corporation identified approximately 14,000 dwellings. An analysis of almshouse RSL housing stock, classified by local authority area, reveals that 18% are in London boroughs, and a further 25% are in either metropolitan district councils (eg, Birmingham, Sheffield) or large urban unitary authorities (eg, Southampton, Nottingham) with populations over 200,000 (population data from *Municipal Yearbook 1998*, excluding East Yorkshire as this is the only unitary authority with a population over 200,000 which includes large rural areas).

This leaves 57% in mixed urban/rural areas, including almshouses in cathedral cities (eg, Chichester), county towns (eg, Northampton), and older or newer urban centres such as the Medway towns in Kent, or new towns such as Milton Keynes, as well as those in villages. Of those almshouse RSLs who did not include information on their stock, some were known to be empty, awaiting funding, or awaiting disposal and it may be assumed that the rest were small, though not necessarily rural.

The examples of almshouse redevelopment in Chapters 6 and 7 includes examples in inner-city areas, smaller towns, villages and hamlets.

What type of housing do they provide?

Another misplaced assumption is that all almshouses are old and historic buildings, dating back to the Middle Ages. In fact, many are of more recent construction. It has been estimated that of the 2,000 or so groups of almshouses currently occupied by almshouse residents, over 30% were built in the Victorian era (Howson, 1993, p 137). However, they often look older because they were usually built in a style which reflects the historical tradition of almshouses: for example, Sir George Gilbert Scott, the great Victorian architect, designed Jacobean-style almshouses in Whitby, and half-timbered Tudor-style almshouses in Godstone, Surrey (Howson, 1993, p 147).

Medieval almshouses were constructed in a variety of forms, often derived from ecclesiastical architecture: the great hall pattern, the cruciform design, and later the collegiate or courtyard form.

There was usually a chapel. Most almshouses from the 16th century onwards have followed the courtyard form of design, of which perhaps the most well-known example to students of architecture is Cobham College, in Kent, built in 1598. Penrose Almshouses in Barnstaple, North Devon, built in 1627, is a West Country example, consisting of 20 individual properties set round a courtyard, with a narrow passage from the street into the courtyard and another passage leading to the rear vegetable gardens.

This courtyard design has been adopted not only for almshouses through the centuries, but also by current developers of sheltered housing. It has even been used as a marketing tool by one company building upmarket sheltered housing for sale, namely the English Courtyard Association.

One reason for the number of newer almshouse dwellings is that existing almshouse charities have constructed many new almshouses this century, as well as refurbishing older dwellings.

In some cases there was no choice. For example, many almshouses in city centres were destroyed or severely damaged by air raids during the Second World War. In such cases, the almshouses were often then replaced on either new or existing sites because of changes to city centres brought about by planning decisions in the years after the war. West Country examples include almshouses in Plymouth, Exeter and Bristol, rebuilt in the 1950s.

Such almshouses are often blocks of flats, similar in design to council or private flats in appearance, and have no particular architectural value or distinguishing features. However, they remain classified as almshouses because they are still owned and managed by almshouse charities, under the rules laid down by their founders and benefactors.

More recently, charities have sold off almshouses in unsuitable locations and used the proceeds to build modern replacement almshouses elsewhere: again, they retain the characteristics of almshouses because of their ownership and style of management. Almshouse charities have also expanded and purchased new greenfield sites (often with funding from The Housing Corporation), or built new dwellings in the grounds of existing almshouses.

Almshouse charities have provided over 3,000 new almshouse dwellings in the 10 years from 1986 to 1996, nearly one tenth of their total housing stock, as well as modernising and upgrading over 5,000 dwellings in the same period (Almshouse Association, 1996/97, p 4). Some larger almshouse charities have also moved into providing housing with extra care and residential and nursing homes, as discussed in Chapter 7.

How are almshouses funded?

Almshouses differ from housing association or local authority housing in that much of their housing stock has existed for centuries, was provided with no recourse to public funds, and the almshouse residents paid no rent.

Almshouse revenue funding is complex and is linked to the status of almshouse residents as beneficiaries of a charity rather than as tenants. It is discussed in more detail in Chapter 5. To summarise the position, in the past, the original endowment was intended to pay for all the running costs, although for less well-endowed charities this was often insufficient. Almshouse residents lived rent-free, as beneficiaries of the charity; some also received regular or annual payments from the charity, or goods in kind.

Since the introduction of rent rebates (now Housing Benefit), and encouragement from the Almshouse Association to modernise and rebuild almshouses after the Second World War, nearly all almshouse charities have made charges to their residents. In many cases these are significant, sometimes as much as council or housing association rents on similar housing for older people. Almshouse charities whose endowments enable them to subsidise these charges may use investment income to do so, but others charge the sum recommended by the Rent Officer service as the equivalent to a 'fair rent'. Hardly any almshouse charities now make any payments to their residents, although a few still give nominal amounts, for example at Christmas.

Because capital funding for most almshouses came from the benefactor(s), the original land and construction cost has already been paid for. This has meant that in recent years, their main need for capital funding has been for refurbishment,

upgrading and (sometimes) conversion of existing buildings, although they have also received funding for new-build housing. In contrast, most housing associations have bought or built nearly all of their housing stock since the introduction of HAG in 1974.

Traditionally, almshouse capital funding has come from a number of sources, the limitations of which are discussed in Chapter 3.

Charities' own resources

Money provided by the original benefactor(s) was the main source of funding for building and maintaining almshouses until the availability of public funding during the second half of the 20th century. Some almshouses have been modernised, upgraded or even rebuilt during their long history, using their own charitable funds. For example, the St Martin in the Fields Almshouses in London were relocated and rebuilt twice, in 1681 and in 1818 (Howson, 1993, p 144). Almshouses have also been able to sell assets or raise loans against the security of their property in order to finance improvements.

Local authorities

Repair and improvement grants have been a significant source of funding for almshouse charities since the introduction of various grants for improvement and repair of old property from 1949 onwards (Balchin, 1995, p 59). This was the major source of external grant until the mid-1970s.

English Heritage

For buildings which are listed as being of historical interest, almshouse charities usually seek funding from English Heritage to preserve the architectural fabric of the historic building. Such funding can be combined with other sources such as local authority grant or Housing Corporation funding.

Lottery funding

National Lottery Heritage funding is also beginning to be available for almshouses, particularly those which have non-housing buildings such as museums, as featured in Chapter 6.

Other charities

Almshouse charities may also seek funding for capital building works from other charitable sources; sometimes this is helped by a particular connection (for example, other charities set up by the same benefactor or for similar purposes such as to benefit a particular trade or occupation).

Housing Association Grant/ Social Housing Grant

Since Housing Association Grant (now Social Housing Grant) became available to registered housing associations after the 1974 Housing Act, The Housing Corporation has provided many millions of pounds of public money for almshouses. This became the preferred route for almshouses seeking modernisation and, increasingly, replacement or expansion through new-build. The Almshouse Association “lost no time in advising its members of the benefits of registration” (Howson, 1993, p 166).

Between 1974 and 1997, over 600 almshouse charities registered with The Housing Corporation; it is assumed that most, if not all, of these registrations were in order to obtain a grant, although some never succeeded in getting a grant allocation. Almshouse charities are one of the few categories of organisation that the Corporation will still register.

HAG/SHG is a government grant for capital housing investment for people in housing need and on low incomes. It can be accessed via the local authority or, more usually, through The Housing Corporation: the data in this section is for funding from The Housing Corporation only. Records show that almshouse RSLs have received significant public funding since the 1974 Housing Act introduced HAG/SHG, usually at between 0.4% to 0.5% of total Corporation funding (data from Pannell, 1982, The Housing Corporation and DoE figures).

In the seven years from 1976-77 to 1982-83, almshouses were allocated nearly £34m (0.49% of total HAG), an average of £4.85m per year. Over half (£18.6m) was for new-build almshouses and approximately half of this was for new almshouses on new sites purchased with HAG, rather than on land already owned by the almshouse charities.

In the seven-year period from 1988-89 to 1994-95, almshouse funding remained at a similar level, totalling £46.435m (0.43% of total HAG), an average of £6.633m.

Corporation funding for almshouses in the late 1990s is running at a somewhat lower level than earlier years, averaging only £2.48m per year from 1995-96 to 1999-2000. Most is now for refurbishing, improving and repairing existing housing rather than new-build. However, the 1999-2000 allocation is the highest in recent years (£3.65m) and with a larger proportion of the allocation for new-build (£2.623m). Like other RSLs, almshouse charities are now having to raise more of the finance themselves. In recent years, SHG has met less than half the costs of the capital works carried out, with the rest being raised by the almshouse RSLs.

(All these figures are underestimates of the total public funding of almshouse charities through HAG/SHG. The older figures (1976-83) were only forecasts and understated the actual grant paid. Recent figures also underestimate funding, because where almshouse charities are not RSLs themselves, and are working in partnership with housing associations, their allocations do not show in the figures for almshouse RSLs. Although Durham Aged Mineworkers' Homes is an almshouse charity, it is so untypical that its Corporation funding is always recorded separately. As it has received millions of pounds for upgrading stock in the last decade, to avoid exaggerating the figures for overall almshouse funding, DAMHA grant allocations have also been excluded. Finally, the figures do not include any HAG/SHG paid through local authorities rather than The Housing Corporation.)

Figure 6: Almshouse RSL funding from The Housing Corporation (1988-2000)

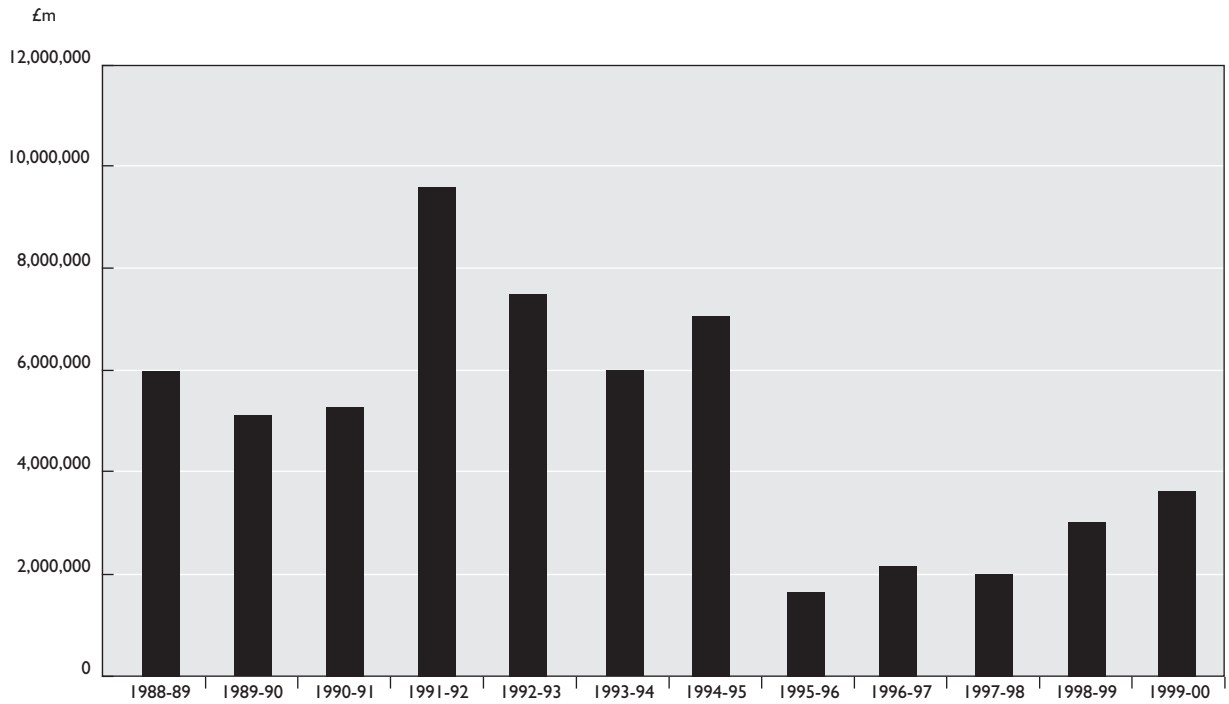
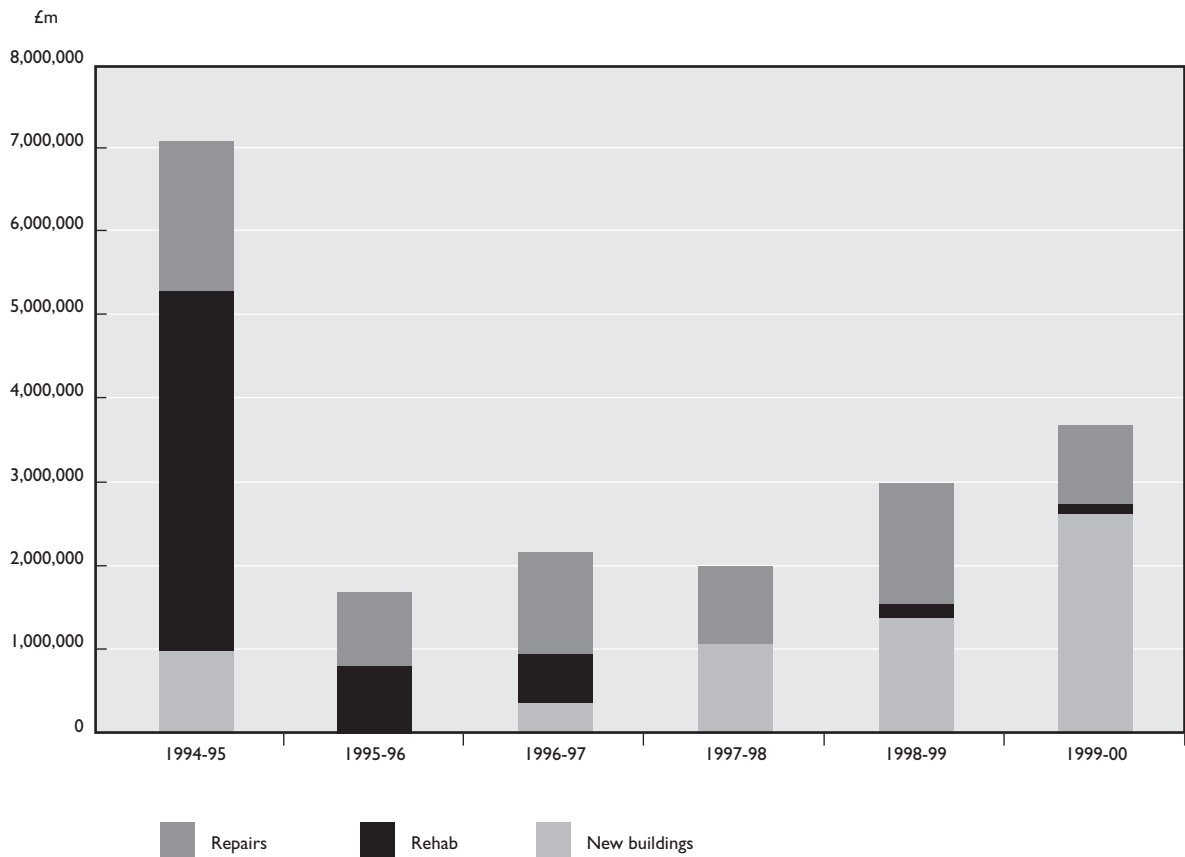


Figure 7: Almshouse RSL funding and types of project (1994-2000)



Conclusions

This chapter has defined almshouses, providing an overview of their history, their regulation, their organisation, their location, their occupants and their funding. Despite their relatively small numbers, they are considered to represent a valuable and diverse housing resource. This enables them to make a distinctive contribution to meeting housing need, as long as appropriate steps are taken to overcome some of the potential difficulties discussed in Chapters 3, 4 and 5.

Problems and issues: housing design and funding

Introduction

This chapter focuses on problems of housing design (for both almshouse charities and their residents), and on access to capital funding to tackle disrepair and outdated design.

Rising expectations versus old buildings

Many almshouses can provide attractive and convenient housing, but it is easy to be over-romantic about the joys of living in old buildings. There are inherent difficulties in reconciling the conflicts of interest between preservation of ancient buildings and rising expectations of current and future residents.

While previous generations of almshouse residents may have coped, the population now living in older people's housing is significantly older and often frailer than before. There are more very old people in their eighties and nineties who, while capable of looking after themselves, often have limited mobility and perhaps other health problems. Older people also have increased expectations, not least because most have enjoyed better housing conditions and facilities than earlier generations (Means, 1997).

This means that some almshouses have become hard to let and a number have remained empty. This has often been because of disrepair and outdated facilities. The chairman of the trustees of one group of almshouses described the reasons for upgrading their bedsits:

“Four or five years ago, an old lady died and when the trustees looked at her flat, they decided it wasn't really habitable – bath in the bedroom, poor heating and so on.”

The clerk to the trustees of another group of almshouses, most of which were more modern, said he thought that in the future there would be a greater demand for larger kitchens, with space for modern appliances, and by the next century, more people wanting two-bedroom dwellings.

As described in Chapters 6 and 7, attempts have been made to remedy these problems and bring the housing back into use, but there are often complex combinations of problems involving design and conservation, access to funding and difficulties in making partnerships work effectively.

Design and conservation limitations

Many traditionally designed almshouses only allow enough space for bedsits or for dwellings with shared facilities. As housing association and local authority providers of sheltered housing know, such units are generally unpopular with an older generation now accustomed to better space standards and modern facilities. While there will always be some people who will make sacrifices for the pleasure of living in an historic building, most older people now want, as a minimum, a one-bedroom self-contained dwelling.

Many almshouses occupy prime sites, well-integrated into their village or town centre sites. Many also display attractive design, most frequently in a courtyard arrangement. However, the courtyard design has both advantages and limitations. The

courtyard design has a continued usefulness in encouraging social interaction between residents. From a security point of view, three- and four-sided courtyards are good ways of 'designing out crime'. These designs can provide safe and peaceful housing, with the three or four sides effectively blocking out noise and entry by unwelcome visitors.

But when almshouses of this design need upgrading, there is little space to expand because the almshouses are facing into each other. This is particularly the case in urban areas. The outside walls may also abut main roads, with the problems of dirt and noise from passing traffic.

Lanyon Almshouses in Plymouth, a Grade II listed building, were upgraded in 1982 using local authority HAG from Plymouth City Council. There are 16 bedsits on ground and first floors, conveniently situated in the city centre but with no lift, for women of retirement age. The area is densely built and the courtyard design does not allow space for extension, so the dwellings remain as bedsits.

The only way to get one-bedroom flats in such circumstances is to convert two bedsits into one flat, thereby losing half the dwellings. From the almshouse perspective, it means a dramatic reduction in their units. From The Housing Corporation's point of view, this is unlikely to be thought to provide good 'value for money'. In any such scheme with a warden, there is a further problem of the 'two into one' solution: it can also make the scheme uneconomic in revenue terms, as the warden costs would increase too much when spread over only half the number of dwellings.

The traditional design of many almshouse dwellings can cause other problems, too. Whether the almshouses are really old, or Victorian pastiche, their small windows and narrow stairways can make them unsuitable for older people in the late 20th century.

Small windows can make old almshouses very dark inside, especially if hemmed in by other buildings, often the case in urban areas. This can also make them depressing environments for older people who may remain indoors for much of the time. Courtyard gardens can help mitigate this, but many such gardens in the typical three-sided design are open to the street on the fourth side. This affords

little privacy, especially in town or city centre locations, so the opportunity for sitting outside may in reality be limited.

Narrow twisting stairways, whether within two-storey cottages or to gain access to upper floor flats, may be loved by the conservationists but can make dwellings quite unsuitable for older people with limited mobility. It is for such reasons that a number of almshouses have changed to housing younger people.

Other design features may appear quaint, but have their limitations for those who have to live in the dwellings. Heavy oak doors can be difficult to open and close, and their large iron keys (three or four inches long in some cases!) can be heavy and awkward both to carry around and to use. High ceilings, or conservation requirements to keep attic spaces open, make dwellings more expensive to heat. Conservation requirements may also insist on electric storage heaters to avoid pipe runs in historic buildings; this can be less controllable than the more popular gas central heating. Windows may be draughty, yet impossible to double-glaze while abiding by conservation requirements.

Keeping old construction techniques (such as horsehair plaster or cob) or prohibiting dry-lining or sound-proofing between floors, means that converted dwellings may not meet current building regulations requirements for thermal or sound insulation, nor Housing Corporation standards. One resident felt:

"... very privileged to live in such an ancient building ... the cottages are very pretty, but you can hear next door's TV, and people talking – you can almost hear what they're saying!"

As an architect explained, conservation requirements often mean that:

"... we are never able to achieve modern standards in an old building. For example, we can't get acoustic separation in this Scheme because we're not allowed to touch the timber floor, which means we can't achieve Building Regulations requirements for sound insulation. Likewise thermal insulation – the listed building has to have solid walls, and we have to put lime plaster on them, and can't dry-line them. So the house will be no warmer than it was in the 1600s, although we can insulate the roof and

the floor. The housing association would have liked central heating, but English Heritage wouldn't permit pipework, so we have to have night storage heaters."

In all these cases there is likely to be a conflict of interest between housing providers and conservationists. As one almshouse trustee put it:

Lady Flo [the 17th century benefactor] didn't leave the house to the parish to be a wonderful historic this or that. She left it to house the poor. Like anyone with a hobby horse, conservationists become incapable of compromising to make something work. (Chesshyre, 1997, p 34)

The disadvantages of different funding mechanisms

As discussed in Chapter 2, almshouse funding has come from the following sources, all of which have their limitations.

Charities' own resources

Traditionally the main source of funding, this continues to be an important source of finance for almshouse modernisation and redevelopment.

Some almshouse charities are wealthy, with substantial endowments and property investments, and these have been able to fund their own improvements and new developments. Some have used their own funds to move into new forms of provision, such as housing for frail older people, as in Chapter 7.

However, many others, particularly the smaller or more rural charities, are poorly endowed, with little or no investment income or land. Some cannot even afford regular maintenance, and certainly not upgrading to modern standards.

There are legal limitations on where charity trustees can invest, requiring investments to be low-risk. Such low-risk investments may not keep pace with inflation, especially when inflation is high, so following such an investment strategy may have diminished what endowments the charity did have.

A number of almshouse charities have had to sell off land or other assets in the past to raise money for maintenance or improvement, thus reducing their

scope for financing modernisation or extending their almshouses.

This point interacts with the attitudes of charity trustees to the setting of weekly charges (which is the almshouse equivalent of rent, as further discussed in Chapter 5). There has been a tendency for some almshouse trustees to charge too low a level of contributions from residents towards the cost of maintenance and improvement. Almshouse residents may, not surprisingly, have been unwilling to pay for substandard housing, leading to a downward spiral. The Almshouse Association is to be commended for its efforts over the past 50 years in encouraging trustees to make realistic charges and to borrow money if necessary, in order to maintain and upgrade almshouses.

Local authority repair and improvement grants

This was the major source of funding during the 1950s and 1960s and remains available today on a more limited basis. There have always been disadvantages: there were fixed upper limits, so grants rarely if ever met the full costs, and only covered modest upgrading, not large-scale rebuilding. Trustees always had to seek additional funding either from their own resources or externally, usually by raising a loan. But such grants had advantages too: relatively straightforward administratively, fairly quick to obtain, dealt with locally and with no strings attached.

Housing Association Grant/Social Housing Grant

As discussed in Chapter 2, more generous grants became available to registered housing associations in the form of Housing Association Grant (HAG) from 1974 onwards, now SHG.

However, HAG was much more complex to obtain than local authority improvement grants. Almshouses had to register as housing associations with The Housing Corporation. They then became subject to all the procedures, requirements and monitoring of The Housing Corporation on top of the demands of the Charity Commission. This monitoring applies not only to the development phase, but continues indefinitely over the running of the charity and the management of the dwellings,

hence the current interest in deregistering.

Almshouse trustees and clerks are vociferous in their complaints about the overwhelming bureaucracy of Corporation requirements. As one trustee, who was in fact a former civil servant, put it:

The trustees were competent people, but we just didn't have the time. We were sent forms designed for an aircraft carrier: all we had was a coracle with a leak. (Chesshyre, 1997, p 34)

To obtain grant, almshouses have also been in competition with other housing associations, and subject to the ups and down of Housing Corporation funding from central government. Because most almshouses are for older people, they have also suffered funding cuts during periods when the housing needs of families, younger people or homeless people have been prioritised above those of older people.

Over recent years, the Corporation has worked much more closely within priorities defined by local authorities, so almshouses also need to gain the support of their local authority in order to access Corporation funding. In some cases, local authorities are not willing to prioritise almshouses in this way; anecdotal evidence suggests that this is particularly likely to be the case where the local authority is Labour-controlled, given some of the attitudes to almshouses as discussed in Chapters 1 and 2. Even if this is not the reason, as local authorities increasingly develop formal partnership arrangements with a limited number of housing associations, almshouses have been left 'out in the cold' if they are not part of such an 'inner circle'.

English Heritage funding

Funding from English Heritage is usually needed to pay for the extra cost of work to preserve a listed building, and can be combined with other sources such as local authority grant or Housing Corporation funding. However, English Heritage and local authority conservation officers may require works to be carried out without necessarily being willing to provide funding towards the works. They may also impose design requirements, as discussed above, which conflict with the needs of residents and modern standards. These problems arose in a number of the almshouses in this research.

Lottery funding and other charities

National Lottery Heritage funding is now beginning to be available for almshouses, as featured in Chapter 6.

Almshouse charities may also seek funding for capital building works from other charitable sources, as in Chapters 6 and 7. The Almshouse Association has its own scheme to provide small grants or loans to member charities, recently boosted by its 50th anniversary appeal for £2.5m. Some almshouse charities are grouped with other charities in the town or area, as (town name) Municipal Charities. These may include small 'relief in need' charities. These usually give small grants to needy people, but there may be scope to use money towards repair or improvement of the almshouses.

One of the problems of combining funding from a number of sources is the sheer complexity of putting them all together and actually getting on site to do the works before the building deteriorates even more, planning permissions are lost or one of the sources of funding becomes time expired.

Development issues: consultants, procurement, design

Despite the encouragement of almshouse charities to work with more experienced developing housing associations, many have appeared to remain outside the mainstream in their approach to housing development.

There have been major changes in housing association development since the 1988 Housing Act. Instead of appointing a long-standing, favoured architect or other consultant, housing association developers now hold competitions, interview a shortlist, negotiate, and generally introduce competition so as to bring fees down and obtain better value for money. Housing associations are under pressure from The Housing Corporation to ensure that work is evenly spread between consultants, so that 'cosy' relationships between development staff and external consultants are avoided and costs are tightly controlled. They are also encouraged to use Design and Build contracts to obtain savings: this route removes the traditional

One almshouse charity studied during the research has been trying to modernise its empty and derelict almshouses for nearly 20 years. It illustrates the frustrations experienced by almshouse trustees, architects and partner housing associations.

- Early 1980s** Almshouses in poor repair; as occupants move out or die, they are not replaced. Almshouse trust has no money for repair or upgrading.
- 1984** Almshouse charity joins Almshouse Association. Work starts on finding architect and new trustees and formulating new Scheme.
- 1986** New Charity Commission Scheme approved, new trustees appointed, architect appointed. Last occupant dies, almshouses now empty.
- 1987-88** Architects obtain planning permission for refurbishment; charity registered with Housing Corporation but application for HAG unsuccessful.
- 1990** Partnership formed with local housing association experienced in almshouse work; detailed specification drawn up, trustees confident they will now get allocation of grant through housing association.
- 1991** Grant allocated, but not enough to cover the cost of the proposed refurbishment and conversion.
- 1992** Architect warns trustees that planning consent and listed building consent in danger of expiring. No action taken, both consents lost.
- 1994** Capital grant allocation received but has to be spent within financial year. Trustees reapply for lapsed planning and listed building consent; local authority asks more questions, responses delayed, consents lapsed.
- Building now in precarious state, 'Buildings at Risk' grant applied for from English Heritage: application unsuccessful.
- Architects reapply for listed building consent: English Heritage deems conversion plans 'over-development'. Number of dwellings reduced, change of use from older people to single people, couples or small families. New planning and listed building applications submitted and agreed.
- 1996** Delays and changes mean now over budget, risk of Scheme being aborted.
- 1998** Scheme eventually on site, completion and first letting summer 1998.

role of the architect and (at least in theory) leads to lower costs.

The Almshouse Association provides guidance to trustees in its publication *Standards of almshouse management*. This was first published in 1989, and revised and updated in February 1995. The 1998 revised version brings the advice up to date.

However, some of the almshouses studied for the research had experienced problems. For example, trustees of one almshouse were annoyed to find

themselves tied in to a 6% fee agreement at a time when it would have been easy to negotiate lower rates. At another almshouse, a housing association's involvement and knowledge meant that savings were made by the use of a Design and Build contract, despite a complex project restoring listed buildings.

Conclusions

One of the greatest problems facing almshouse charities and their partners is the conflict between the demands of conservationists (and the costs

which accompany these demands) and the need for adequate, value-for-money housing.

For everyone who shares a fascination with almshouses, their historical interest is often centred on the buildings themselves, and their importance in the village, street or town centre scene. Respondents in this research study (trustees, clerks, architects and housing association staff) were not unsympathetic to the need for conservation expressed by English Heritage and local authority conservation officers. Yet surely there is a problem if the demands of the conservation lobby (and, too often, their unwillingness to fund the extra costs of their demands) prevents re-use of the building?

4

Problems and issues: management and partnership

Managing in a time of change

As for other housing and social welfare organisations, managing almshouse charities during a time of change is demanding for both trustees and paid staff. There has been a plethora of changes in legislation and guidance affecting almshouse charities over recent years, including the 1993 Charities Act, the 1996 Housing Act (and previous housing legislation), equal opportunities legislation (on race, gender and, most recently, disability) and a mass of law and regulations on health, safety and building matters. Then there is the need to meet the regulatory requirements of the Charity Commission and, for many, The Housing Corporation.

Like other smaller voluntary agencies, some almshouse charities may find it difficult to meet all these requirements. These problems will be greater if clerks and/or trustees lack the relevant experience or fail to access adequate advice to help them in their task.

This chapter explores the issues faced by almshouse charities in managing their affairs, and by almshouse charities, housing associations and local authorities in working in partnership with each other.

Problems and opportunities: the role of Almshouse trustees and clerks

There are over 10,000 voluntary trustees involved in the running of almshouse charities. The Bishop of Ely, in his address at the 50th anniversary service of the Almshouse Association, described the task facing almshouse trustees as being “to keep lively and fresh

the great tradition of almshouses in this country” (Almshouse Association, 1996/97, p 5).

The experience and commitment of almshouse trustees, as with voluntary organisation or housing association committee or board members, is crucial. The research study visited almshouse charities which are using their investments to develop new services, and which are willing to re-examine their role and work in partnership to reinterpret the need for their almshouses into the future.

One of the clerks to the trustees explained his view of how this should be achieved in more detail:

“Almshouses should ensure that they maximise their resources in pursuit of their aims and objectives. This should be kept as a live debate all the time, with ‘Schemes’ evolving if necessary and the original founder’s intentions regularly discussed and re-interpreted by the trustees to fit in with the twenty-first century.”

Yet some research respondents also spoke of almshouse charities which, in their view, were rich but inactive, sitting on large reserves, watching them accumulate and not fulfilling the original aims of the trust. In other almshouse charities, they have the right intentions, but trustees and clerks are unskilled. In the view of one clerk to the trustees,

“There are some clerks who encourage caution, pointing out to the trustees legal implications, safeguards and negative aspects but not having much knowledge of active ways of conducting the operation with little knowledge of housing, grant systems, social security benefits, planning, finances. Clerks need to educate trustees on housing issues. Trustees should ask themselves whether they are using their assets to the best effect, in the most effective

pursuit of the original benefactor's objectives?"

The role of the clerk to the trustees can be crucial, because it is usually the clerk who advises the trustees. The role is broad, including managing the finances and investments of the charity, the relationship with the Charity Commission, as well as housing management, maintenance and perhaps development.

The process of developing new housing or renovating older properties often demands speedy decisions. This can be a problem, especially if trustees' meetings are infrequent, or trustees do not understand the urgency of the situation. In the example given in the last chapter, these were the reasons for the expiry of planning and listed building consents. In another case, the whole project was threatened by delays in decision making, and their partner housing association thought this was because "The trustees just aren't used to this level of business ... though we're moving full steam ahead now, the trustees are getting left behind."

Some almshouse trustees lack the necessary skills or access to sufficient advice and support to manage their housing effectively.

In one almshouse in the research, the buildings were in a state of disrepair, with water pouring in; most of the residents had died or left. The trustees were in dispute with the remaining residents and could no longer cope with maintaining and managing the housing: one trustee was aged 97. No accounts had been sent to the Charity Commission for many years. There was no money to refurbish the cottages as, like many small almshouse charities, the original endowments and small weekly maintenance contributions were no longer sufficient to meet 20th-century maintenance bills, let alone pay for modernisation. When new trustees took over, they were overwhelmed by the task facing them. As the clerk to the incoming trustees said:

"There were five occupants, no money, and the building was derelict. Wherever I went for help, the answer was always negative: if you do this, you will be fined, if you do that, you'll be sent to prison. If I had known the problems, I would never have taken it on", he said. Some of the threats, he added, "frightened our lady members to death". He remains bitter about the lack of help from official bodies. "I don't think they cared a damn if we failed,

so long as we failed within the rules. We were sweated labour for three years. All we got were kicks." (Cheshyre, 1997, p 34)

The Almshouse Association advises and helps almshouse charities facing such problems, and lobbies on their behalf to reduce bureaucracy while maintaining appropriate supervision. It recommends that trustees should be appointed for a fixed term to encourage a regular turnover, introducing new ideas and reducing the "possibility of dominance, or of long-term misconduct or fraud" (Almshouse Association, 1998, p 10).

It also recommends that charities establish an upper age limit as a policy, although an over-age trustee cannot be legally compelled to step down. There is a problem with ex officio trustees as they cannot resign while remaining in the office which gives them their trusteeship, yet neither can they be compelled to take an active part.

The legacy of the charitable culture of almshouses can also cause problems. The Bishop of Ely, in the address referred to above, described the almshouse tradition as:

"... a tradition of charitable giving ... growing out of the Church's natural concern for vulnerable people, which seeks to provide shelter, warmth and sustenance and, in the end, a place of affection and safety ... for those who have no other helpers."

But he also acknowledged the potential disadvantage of that charitable tradition, which "may have been claustrophobic and its social life restricted and regimented" (Almshouse Association, 1996/97, p 5).

Some trustees express their interpretation of their charitable ethos in terms which reflect this. As two of the people interviewed during the research said:

"We shuddered at the thought of working in 'Bloxville' [disadvantaged and 'less desirable' area]. The spirit of almshouses is to house people of good character. They have to deserve it. Trustees give their money and time, and expect the places to be respected, not wasted and wrecked."

"The trustees are kind people – they signed up to help elderly people, do charity work. There's a limit to what they should be expected to get involved in. Young unemployed people or people with disabilities would be too much for them."

Problems with partnership arrangements: relationships between almshouse staff, trustees, housing associations and local authorities

Since the development of State provision and large voluntary sector organisations during this century, there has been an expansion and professionalisation of many housing and social care organisations (Hoggett, 1994). For example, the number of housing associations has declined as medium-sized and large associations have merged and taken over small associations.

Recent years have also seen an increase in inter-agency working and partnerships between statutory and voluntary housing and welfare organisations, networking among staff, and competition for resources and clients. All this has been part of the market-oriented approach fostered during the 1980s and early 1990s by the Conservative government (Pierson, 1994). Since May 1997, the government may have changed, but interest in partnership and inter-agency working continues, albeit from a different policy perspective, focusing on such issues as Welfare to Work, Best Value and measures to combat social exclusion (Lee, 1998).

Over recent years there has also been some interest in partnership working among almshouse charities, as illustrated in Chapters 6 and 7. There have been two changes which have influenced this move towards closer working relationships: the impact of Care in the Community and changes in Housing Corporation policy.

Firstly, some larger almshouse charities are now building and managing very sheltered, extra-care housing, and residential care and nursing homes. They had found that, like other sheltered housing providers, their residents were getting frailer and needing more care than could be provided in existing housing. Some are extending their work into the community through day care centres and outreach work. In order to develop such services, it is necessary to liaise closely with local authority social services departments as they are both the regulatory authority and a possible source of funding for some clients (usually on a contractual, payment-

per-person basis).

The second reason concerns Housing Corporation policies to streamline development. In the 1970s and 1980s, most almshouse charities used their own architects, who handled the development process for them. Corporation requirements were also looser than they are today. More recently, the Corporation has required almshouse charities and other small housing associations to use a larger association as a development agent. Thus almshouses have needed to work with larger housing associations if they wished to access grant from the Corporation. Some indicated that they resent this perceived loss of control and feared being swallowed up by larger organisations, but others welcomed the access to specialist advice. As one chairman of the trustees said:

“We recognised that there was a lack of expertise and financial acumen among trustees. Housing Corporation funding is hard to get and ... Housing Association were successful ... the new scheme, which is far bigger, will also use ... Housing Association as managing agents because they're professional.”

Almshouse charities and partnership working

Most smaller charities have no paid staff, and in larger charities, almshouse clerks to trustees or other senior staff may not have a professional background in housing or social care: most of those met during the research were solicitors, surveyors or had retired early from other professions or Her Majesty's Forces. Although the research fieldwork found a few informal links between trustees and clerks and other local housing and social care organisations, many almshouse charities have remained detached from both informal networking and the growing number of formal liaison groups set up to encourage organisations to work together.

Yet professionals have been the main 'change drivers' in promoting partnership and inter-agency working (Hambleton et al, 1997). The importance of such networking is acknowledged as a key to successful partnerships (Cochrane, 1994). Liaison groups and fora can play a crucial role in promoting partnership working and coordination (Oldman, 1997).

Almshouses also run the risk of being isolated from current thinking in housing and social care, espousing more institutional models than are currently in favour in other sectors. One example found during the research was the use of large dining rooms with everyone eating together rather than more homely settings.

The choice of which housing association to work with appears somewhat haphazard. During the research, a number of national and local associations were found to be working with almshouses. This usually arose because of word-of-mouth contacts or local relationships, such as trustees or architects knowing someone from a particular housing association, or links where clerks or trustees were also staff or board members of partner housing associations.

If alliances are made on the basis of a casual encounter rather than an informed choice among different options, the almshouse charity may not have the opportunity to consider the full menu of options available. For example, some associations specialise in housing for elderly people and may give a wider choice of models (from Category 1 housing with no warden through to 'very sheltered' extra-care housing) than non-specialist associations.

Partnerships with almshouse charities: problems for housing associations

The research revealed a range of partnership models between housing associations and almshouse charities:

- housing associations as development agents, and as a vehicle for obtaining grant and/or loan finance;
- housing associations as managing agents, for resident selection and housing management;
- housing associations as corporate trustees, taking on the responsibility from trustees who no longer wished, or were able, to continue;
- housing associations leasing almshouses from the almshouse charity.

However, all the models had their problems.

First of all, while the examples in Chapters 6 and 7 show a fascinating range of what can be achieved,

most have taken a long time, interminable meetings, and a great deal of costly staff time to come to fruition: problems common to any kind of inter-agency working (see, for example, Arblaster et al, 1996; Hambleton et al, 1997). One housing association director was delighted with the outcome, but wondered whether it was 'good value for money', not in terms of grant, but in terms of all the time, energy and effort it had needed. With almshouses, the number of dwellings involved is often small and the time expended out of all proportion to the dwellings gained, whereas other partnerships may yield greater returns.

There are issues around working with almshouses both on development and on housing management.

The development process often demands speedy decisions, as discussed earlier. Delays can cause problems for the housing association partner. In one case, the housing association found that:

"We finally got planning permission for the development and plan to start on site next year, so the tight timetable had already suffered considerable delays up to planning. But though we're moving full steam ahead now, trustees are getting left behind. So on the one hand they're urging us ahead, and yet they don't have the resources ready."

Housing associations are judged by The Housing Corporation on meeting cash planning targets, delivering the number of social housing dwellings they have promised, and taking up grant on time. Such a performance measurement culture does not encourage partnership working with small almshouses on complex projects.

Cost over-runs are another potential problem, and refurbishment works are particularly prone to this, especially to historic buildings. Back in the 1970s and early 1980s, The Housing Corporation was relatively generous in its treatment of cost over-runs, but now the housing association has to bear the full brunt of any extra costs. Small almshouse charities do not have the reserves available to meet such extra costs, and a partner housing association would not be prepared to use its own reserves for such a purpose.

On the management side, there have also been legal problems over agreeing leases and management agreements (between housing associations and

almshouse charities when the association is carrying out housing management). One housing association thought that the almshouse charity with whom they were working was not permitted to lease the almshouses to the housing association, although other almshouse charities in the research were able to do so. It appears that different views have been expressed by the Charity Commission on what is permissible to an almshouse charity. Agreeing such matters can also hold up the development process, leading to extra costs, deteriorations to the building and problems with the availability of finance and permissions.

Acting as corporate trustees is one way to overcome difficulties of liaison, but still has the disadvantage of having to keep separate accounts. Apart from the extra work that this entails, it also has the disadvantage that the almshouse charity cannot benefit from any cross-subsidy from the larger housing association. In one example, this meant that 'rents' were higher than they would otherwise have been to cover the cost of refurbishment.

Partnerships with local authorities: funding and nominations

Almshouse charities can access a range of grants from local authorities. Some councillors and other local authority nominees may serve as trustees. Availability of grant will be determined by the authority's attitude to almshouses, by competing demands for money, and by the potential for the almshouse development to meet local housing need.

Research interviews suggested that effective liaison with local authorities for nominations of people on their housing waiting lists was infrequent. The exceptions were the good liaison discussed in some of the almshouses in Chapters 6 and 7.

In theory, any almshouse charity which has received SHG/HAG from either the local authority or The Housing Corporation, should be offering the local authority at least 50% nominations so that the local authority can offer the almshouse dwelling to people on their housing waiting list or register. This applies to both first lettings (excluding existing residents in refurbishments) and later relets (when existing residents vacate).

A number of almshouse charities said that although they sought local authority nominations, they rarely received any. Local authority housing managers confirmed that they rarely nominated to their local almshouse charities. They gave a number of reasons:

- a surfeit of sheltered housing and low demand from older people;
- the almshouse charity's resident selection criteria were too restrictive (see Chapter 5 for examples);
- a reluctance to nominate to dwellings with no security of tenure;
- less desirable location or design of the almshouse dwellings (eg, remote rural almshouses with no shops or public transport, bedsit flats, or upper floor flats with no lifts).

The issue of hard-to-let sheltered housing has only begun to receive attention since the late 1980s (Tinker et al, 1995) and this is reflected in comments from a number of people interviewed. As one lettings officer said:

"We have enough problem letting some of our own housing, such as bedsit flats or first floor flats, so we don't want to nominate people to almshouse charities with the same sort of housing when we can't fill our own voids."

Another said that in her town, the problem was that the almshouses were all designed for the 'active elderly' and she didn't have many applicants in that category:

"By the time they apply to us for housing, they need at least a warden, and either ground floor accommodation, or a lift if it's an upper floor flat. We just don't have the demand for the type of housing they offer us."

Conclusions

Almshouse charities, like other voluntary organisations, will need to develop working partnerships with both voluntary and statutory organisations if they are to make their full contribution to social welfare in their locality. Almshouse charity staff and trustees will need to access the expertise available to them through such partnerships. There is much scope for both local authorities and housing associations to work in partnership with almshouse charities. However, like other forms of multi-agency working, this is likely

to be time-consuming and there is a need for clear understandings of what is required on all sides.

Access to almshouses and housing management: the position of almshouse residents

Introduction

This chapter examines how people access almshouses, and the practicalities of housing management for almshouse residents. There are a number of differences between the position of almshouse residents and tenants of other types of housing. This situation has arisen because of the development of tenants' rights during the course of the 20th century. In previous centuries, almshouse residents may have been no worse off (and probably, in practice, were often better off) than others. What is not known is the extent to which a lack of legal rights causes problems to most almshouse residents in practice, although there have been a few high-profile cases.

Anecdotal evidence and discussion with key figures in the almshouse movement and with the housing ombudsman suggests that the lack of legal rights causes few problems in practice, but further research among almshouse residents would be needed to confirm this. The residents interviewed for this study varied in their attitude to their lack of legal housing rights: their comments are quoted in the relevant sections below. Future generations of older people, growing up in the later 20th century, when both consumer and citizenship rights have received more emphasis, may also be less willing to accept housing without such rights than the current generation of older people.

Over recent years, tenants have demanded clearer rights and there has been a great deal of legislation. There has also been plentiful guidance on good practice in housing management, produced by

housing and specialist organisations, so that tenants and housing managers in both local authorities and housing associations now have a basis of accepted good practice against which they can measure their organisation's performance. Landlords in the social rented sector are now expected to give due regard to tenants' rights and to encourage tenant participation, although the extent to which social landlords actively implement these concepts still varies widely.

There has been a similar increase in the guidance available to almshouse trustees on housing management issues, particularly the Almshouse Association's *Standards of almshouse management*, produced by a working party of Association members in 1989, revised in February 1995 and substantially rewritten and published in June 1998.

This chapter covers the following matters:

- security of tenure and tenancy rights;
- grounds for eviction;
- mutual exchanges and housing mobility;
- rights of succession;
- consultation with residents;
- complaints procedures and access to the housing ombudsman;
- rents and maintenance contributions;
- equal opportunities;
- the Almshouse Residents' Guarantee.

How do residents gain access to almshouses? Allocations and internal transfers

Almshouse residents are selected for 'appointment' to a vacancy in an almshouse under the Scheme (rules) of the almshouse charity. The rules for appointment will reflect the wishes of the original benefactor. They may have been changed over time, but this only happens rarely and with the agreement of the Charity Commission, who always try to stay as close as possible to the original.

This is because almshouse charities are charitable trusts:

The law of trusts is complex, but a fundamental premise affecting all trusts is the principle that no change may be made to the purpose or benefit derived for which the trust was originally set up. This is referred to as the doctrine of 'cy-près', from the Norman French, meaning roughly 'close to'. Down the years since 1857 [the foundation of the Charity Commission] there have been attempts to relax the doctrine because, it was argued, it often gave rise to confusion among trustees and was seen as stifling new initiatives and inhibiting change ... the view taken by the Charity Commissioners and endorsed by government was that the doctrine of 'cy-près' was very flexible and that to bind it by actual legislation would inhibit its evolution and narrow its scope. (Howson, 1993, p 142)

This explains why some almshouse charities may have restrictive allocations criteria compared with social rented housing. Typical criteria include at least some of the following:

- a minimum age (often only 50 or 55, reflecting the shorter life expectancy of earlier generations);
- residence in a specific town, village, or more closely defined area such as a parish, often for a specified period which can range from a year to a lifetime;
- religion, usually membership of a specified Christian denomination (most commonly the Church of England; less frequently, another denomination; occasionally a clear exclusion of people from particular denominations; sometimes an expectation or requirement to attend services in the almshouse chapel);
- marital status (certain almshouses cater exclusively for spinsters or for widows or widowers);
- gender (a number of almshouses remain single-sex institutions);
- occupation (of applicant or spouse), especially for those almshouses founded by a benevolent society, trades union, landowner or employer to house retired employees or their widows;
- income, usually specifying that applicants should be poor (with some older sets of rules excluding the 'undeserving' poor who received Poor Law relief or had not made adequate provision for their old age);
- character, usually specifying that applicants should be 'of good character' and sometimes excluding certain occupations (eg, keepers of ale-houses or tobacco-shops) (Pannell, 1982, extracted from almshouse rules).

Some almshouse charities have, with the agreement of the Charity Commission, broadened their rules. Like some specialist housing associations, they 'give preference' to people who fall within their narrow criteria but can then take others in need. But many almshouse charities still remain restricted to the narrow criteria laid down in centuries past.

The allocation policies of local authorities and housing associations are regulated by legislation and case-law, by regulatory bodies (such as the Audit Commission and The Housing Corporation) and by good practice promoted by organisations such as the Chartered Institute of Housing (the professional body) and the National Housing Federation (the trade body for housing associations). So allocation policies must meet a range of criteria based on law and good practice.

Compared to social rented housing allocations policies, almshouse criteria have only a few similarities and a number of differences. Housing associations specialising in housing for older people also have lower age limits. But housing associations rarely specify location as a criterion, and local authorities usually only require applicants to have a connection with their district or town/city. Social rented housing does not discriminate on grounds of religion or previous occupation, personal references are not required, nor are applicants asked to 'be of good character' (although perhaps there is some flavour of this coming back with introductory tenancies and moves to restrict lettings on certain estates).

Almshouse formal rules rarely give priority with regard to an applicant's existing housing circumstances, nor the reasons for a move (such as poor health or needing to be near to family), which are the major reasons for older people seeking access to sheltered housing (Means, 1997). However, anecdotal evidence from clerks and trustees does suggest that almshouse charities take these factors into account informally. Of almshouse residents interviewed, one couple had to move out of a mobile home as it was too cold and damp for them in the winter, and another resident needed ground floor accommodation instead of her three-bedroom house with an upstairs bathroom; these would be typical cases where previous housing conditions would affect allocations to social housing as well.

In discussions with trustees and clerks, it appeared that practice varied in inviting applications and allocating housing. Advertisements were generally placed in a local paper either when vacancies arose or once a year, stating the criteria for residents and inviting applications. It seemed rare to have a written procedure or pointing system to select between applicants. Of almshouse residents interviewed who lived in 'traditional' almshouses, word of mouth, having a friend in an almshouse, or church connections were common routes into almshouses.

Exeter Municipal Charities is one example where the charity holds a waiting list and also a transfer list. They have sent details of their criteria to local advice agencies and receive a number of applications from such agencies. The trustees have changed their rules to give priority to existing residents who need a transfer on medical grounds, giving them priority over new applicants. This decision has been taken because some applicants were reluctant to accept first floor flats with no lift in case they needed ground floor accommodation in the future.

In many cases, the allocations practice of almshouse charities seems similar to the previous system used by many smaller local authorities and some housing associations, which was known as the 'merit' system of allocations.

The problem with such a system is that it is not transparent. It is also difficult to explain the reasons for rejection to an unsuccessful applicant, or to have any sort of appeal system. For these reasons, most housing associations and local authorities have now

moved to more formal systems (Cole and Furbey, 1994, pp 123-4).

Security of tenure and tenancy rights

Once an almshouse resident has been selected, their legal position is different from a tenant of social rented housing. It has been generally accepted in law that almshouse residents are not tenants: they are, legally, 'beneficiaries' under a charitable scheme, occupying their accommodation under a licence. This position was confirmed in the Court of Appeal in April 1998.

In the past, many almshouse residents only occupied a single room and had to share facilities such as bathrooms or toilets. Almost all almshouse residents now live in self-contained dwellings. Under housing law, if someone has exclusive occupation of a self-contained dwelling, and meets certain other conditions such as paying rent, they will usually be considered to hold a tenancy (subject to certain exceptions, for example, people in tied accommodation which is linked to their job).

Almshouse charities have always been excluded from the legislation which conveys such housing rights. According to the Almshouse Association,

The rationale for this view is that the trustees of an almshouse charity have no power to grant a tenancy to any of the beneficiaries. (Almshouse Association, 1998, p 66)

Before 1980, council tenants had little legal security, so the position of council tenants and almshouse residents was not so different. Since the 1980 Housing Act (and subsequent consolidating legislation), council and housing association tenants have the following rights:

- security of tenure (ie, the landlord needs a court order before eviction, and cannot normally require a tenant to move from one dwelling to another);
- the right to succession (ie, relatives living in the property have a right to the tenancy on the death of the tenant);
- the right to a mutual exchange with another social rented housing tenant (subject to safeguards, eg, potential overcrowding);

- the right to buy (excluding sheltered and other adapted housing, and certain housing associations);
- the right to carry out repairs (and charge the landlord);
- the right to consultation on the management of their housing.

Alongside these rights, social rented housing tenants have access to HOMES (the national housing mobility scheme) and the housing ombudsman.

In contrast, almshouse residents have no legal security of tenure or other rights, because as 'beneficiaries' they have no legal 'interest' in the property they occupy. Whether or not this generally affects occupation of their almshouse dwelling in practice, their lack of security of tenure means that, in theory:

- they can be evicted without the need for a court order;
- they can be required to move, either temporarily or permanently, to another almshouse belonging to the same charity;
- relatives have no right to succession after the death of a resident;
- residents have no right to mutual exchange;
- there is no right to buy, no right to repair and no right to consultation.

Leaving an almshouse: grounds for eviction

Residents' lack of security of tenure is clearest when it comes to possible grounds for eviction.

Almshouse rules list the reasons why residents may have to leave their dwelling. The Almshouse Association guidance (1998) now includes an updated Charity Commission Model Almshouse Scheme (ie, rules), and this has removed many of the more archaic wordings for 'terminating the appointment' (ie, evicting) residents. The previous model rules, which were typical of rules found during the research, stated:

Setting aside appointments

- (1) *The trustees may set aside the appointment of any resident who in their opinion [authors' emphasis]*

- (a) *persistently or without reasonable excuse either disregards the regulations or the residents or disturbs the quiet occupation of the almshouses or otherwise behaves vexatiously or offensively; or*
- (b) *no longer has the required qualifications; or*
- (c) *has been appointed without having the required qualifications; or*
- (d) *is suffering from mental or other disease or infirmity rendering [him] [or her] unsuited to remain a resident.*
- (2) *Upon setting aside the appointment of a resident the trustees shall require and take possession of the room or rooms occupied by [him] [or her]. (Almshouse Association, 1995b, p 31)*

The reference to the decision being made by the trustees 'in their opinion' underlines the lack of any outside arbitration or rights for almshouse residents (except for the ombudsman for those almshouse charities registered with The Housing Corporation), and the fact that almshouse charities do not need to go to court to evict a resident. While clause 1(a) is not dissimilar from most social rented housing tenancy agreement clauses, clause 1(d) is unfortunate in both its tone and its specific reference to mental illness. The tone of clause 2 is also unfortunate in its suggestion that residents could find themselves out on the street with no notice period.

The revised version is much milder in its wording, allowing trustees to terminate an appointment if a resident:

- (1) *was appointed without the necessary qualifications or no longer has the necessary qualifications;*
- (2) *persistently breaches the regulations ...*
- (3) *is no longer suited to be a resident by reason of illness or disability. (Almshouse Association, 1998, p 97)*

The previous edition of *Standards of almshouse management* gave trustees only limited help in this difficult area, but the 1998 edition has two-and-a-half pages of advice, including discussion on the position of a resident who needs to leave because of ill health, frailty or difficult behaviour. Trustees are recommended to 'consider the facts objectively and with care', seek measures to 'overcome the problem' and if this is not possible, seek alternative accommodation and consult with family and

statutory services. The resident is to be given at least four weeks notice (under the 1977 Protection from Eviction Act) and advised to seek help from agencies such as a housing advice agency or the Citizen's Advice Bureau, or a solicitor.

The Letter of Appointment, which a new almshouse resident has to sign and keep, is their equivalent of a tenancy agreement. The Draft Letter (in an appendix to the *Standards of almshouse management*) has a less sympathetic tone than the general guidance to trustees:

Residents may expect to continue in occupation for as long as they need the accommodation and can look after themselves. If health deteriorates they must be willing to accept advice and guidance from time to time, either from their own doctor or a medical consultant appointed by the trustees. The trustees will also consult with the next of kin, Social Services etc to make the most suitable arrangements. (Almshouse Association, 1998, pp 113)

This is not to suggest that almshouse charities routinely evict their residents. The lack of a legal security of tenure may not in fact make much difference to the lives of most almshouse residents. Of the residents interviewed during the research, some didn't think of their housing as almshouses. A couple living in a 16th-century one-bedroom two-storey cottage in a town centre, which looked like a typical almshouse, nevertheless thought that "... now it's really like municipal housing – the money they left all those years ago isn't enough now to run it". Others trusted that they would be all right: "We've been told the only reason we'd be out is if we don't pay the rent. They've been reasonable with us." One almshouse sells tea towels to raise money, reprinting the quaint rules, much to the amusement of the residents.

However, others said they would not have taken up the offer of the almshouse unless it was secure: this was a case where a housing association had leased the almshouses from the charity and had been able to grant assured tenancies.

In discussion with almshouse clerks and trustees, as to whether they have had need to 'set aside' appointments, it was found that most almshouse charities find no need to implement their rather draconian powers. Some said they interpreted their rules quite loosely, and emphasised their role to

house people in need: examples included allowing men or Roman Catholics into almshouses where the rules specified only women or members of the Church of England. They could not imagine turning someone out if, for example, the almshouse was for 'elderly spinsters' and a resident wanted to have a partner or spouse living with them.

One of the clerks to the trustees, who is also a solicitor, said that in his opinion the lack of legal security of tenure made little difference in practice. He would only ever seek possession if the resident were in serious breach of conditions which would be sufficient grounds for possession even if there were a tenancy: rent arrears and serious nuisance were the most likely grounds.

However, there is the extraordinary case of Partis College, Bath, reported in full in the local press (*Bath Chronicle*, 1994a-d, from where these quotes are taken). The almshouse charity is not a RSL but it is a member of the Almshouse Association.

Two ladies, then aged 81 and 82, lived at Partis College, Newbridge, Bath. One was a retired missionary. The College is an almshouse founded in 1825 for women over 50 'who must be members of the Church of England and sincerely attached to her doctrines'.

Following the General Synod's vote in favour of women priests, the parish priest of their church left the Church of England and converted to Roman Catholicism. The two ladies decided to leave the Church of England and also convert. Before they converted in May 1994, they were told by the trustees of Partis College they may be evicted. Miss Edna Curtis, who had been a resident for two years, told the newspaper:

"We want to stay here if possible, but I don't think it will be. I was very unhappy about the ordination of women ... I am going over to the Roman Catholic Church no matter what happens."

The Archdeacon of Bath, one of the trustees, explained:

"The terms of the trust are that to be admitted [as a resident] you have to be and to stay, as I understand it from lawyers, a communicant member of the Church of England. The thing is we have a chapel at the college

and they [ie, residents] have to go to chapel services. The problem is that if a person becomes Roman Catholic, then they are not allowed to receive communion in the Church of England. It may well be that the Roman Catholic church will find them something."

By September 1994 they had been given notice to quit, and didn't know what they would do. Miss Curtis said:

"We have been given until January 1995, that is the notice to quit. If we don't, I suppose it will mean eviction. I am resigned to it really, it is against the rules. It's not very pleasant. I have tried Bath City Council but they don't do anything until the last 28 days."

The solicitor for the trustees expressed the trustees' regret, but:

"... since the ladies no longer fulfil the criteria for residence they must ask the ladies to leave the College... There are ladies who would fulfil those criteria and who are ready to move into the College."

By December 1994, the paper reported that the two ladies had "given up their fight to stay... Retired missionary Miss Curtis today admitted that she had agreed to go." The newspaper expressed its surprise that such a thing could happen in the 1990s: "Even to contemplate depriving two sincere elderly ladies of their homes simply for re-examining the way they worship seems, frankly, beyond belief."

Thus although most clerks and trustees may be expected to interpret their rules liberally, the lack of legal security of tenure and the ability of the almshouse founder to dictate housing management practice centuries later can remain a problem.

Although a case like this is rare, it is perhaps less surprising that some local authorities are reluctant to nominate people on their housing lists to almshouses, given that such things remain possible into the 21st century.

What happens if an almshouse resident wants to move? Mutual exchanges and housing mobility

Housing mobility is another area where almshouse residents may be at a disadvantage. It is possible for social rented housing tenants to move around the

country under the right to exchange and access to HOMES, the national mobility scheme. This may be of less interest to older almshouse residents, who normally come from a local area and may be unlikely to want to move away to another part of the country. Even so, in these days of greater labour mobility, some almshouse residents may wish to move to maintain contact with their adult children, one of the most common reasons for HOMES applications. It is also quite conceivable that an older resident may need to move to more suitable housing, such as ground floor or warden accommodation, which their almshouse cannot provide.

Almshouse residents can in theory arrange exchanges themselves with tenants in social rented housing. However, the incoming resident would need to accept the lack of security of tenure and also meet the often restricted criteria of the almshouse charity. Both housing organisations would also have to agree to the exchange. If unable to find a suitable exchange, almshouse residents would need to access social rented housing through the housing register or waiting list.

Limited potential for transfers and exchanges could affect younger almshouse residents, whether single or with families, more than older people. The research for this report revealed one family who were overcrowded and exchanged from a two-bedroom almshouse into a three-bedroom council house in the same village, with the agreement of the local authority and the almshouse charity.

For moves further afield, the HOMES scheme will accept applications for referral from people living in any tenure (including private rented or owner-occupation) who wish to move into social rented housing. However, receiving landlords usually impose restrictive criteria on whom they will accept and how many they will house under the Scheme. HOMES know of no almshouses which participate in their arrangements for transfers and exchanges. Only local authority or housing association tenants can access HOMESWAP, their national exchange register.

Thus in both theory and practice, almshouse residents could find moving house more difficult than tenants of local authorities and housing associations.

After an almshouse resident dies: rights of succession

The right to succession for relatives on the death of a resident is another area in which almshouse residents could be disadvantaged compared with social rented housing tenants.

Most almshouses are occupied by sole occupants or couples. In the case of couples, the 'appointment' (ie, letting) is normally made to both partners. When one partner dies, almshouse rules can require the other resident to move to another (perhaps smaller) dwelling. Thus, following bereavement, an older person could also have to suffer the upset of being required to move from the dwelling they had shared with their spouse, something which could not happen in social rented housing because of security of tenure.

In the case of almshouses which provide family housing with two or more bedrooms, it is quite likely that a son or daughter or other relative may be living in the house and wish to stay in the property. During the research interviews, one young woman with a child asked what would happen if she died. At the time of the letting, she had been informed that almshouse residents lacked the rights of council tenants. However, she was surprised when told during the fieldwork interview that her relative would have no right to succession, and might have to leave. The housing manager reassured her that a relative would probably be able to stay, as they would meet the criteria of being a local resident (although they could be too well off to be considered 'poor'). But this is very different from the right to succession (regardless of income or other criteria) which goes with a social rented housing tenancy.

Resident consultation and participation

One of the greatest changes over recent decades for social rented housing tenants has been the move towards tenant consultation, participation, membership of decision-making bodies (such as housing association boards) and even tenant management. Almshouse residents are in a quite different position here: while they may be consulted, they cannot take any part in decision making:

Trustees should consult the residents on any major change in the management of the almshouses ... [and] make regular visits to the residents ... [and] involve residents as much as is practicable in the running of their almshouses. Consultation with residents and seeking their participation will benefit their sense of belonging to a community and improve communication with the trustees. However, this must stop short of residents being part of any decision-making process and they cannot become trustees. (Almshouse Association, 1998, p 52)

The Draft Letter of Appointment is worded rather more bluntly. There is no mention of consultation with residents on housing management issues:

The trustees may take such steps as they think proper in the administration of the trust and for the residents' welfare, and any alteration to the rules will be notified in writing to each resident. (Almshouse Association, 1998, p 114)

Notification in writing does not suggest a desire to consult, nor the trustees taking 'such steps as they think proper'. Councils and housing associations have found that the tone and content of such documents gives clear messages to tenants as to whether consultation is real, or just lip-service, so the wording here is unfortunate.

Mechanisms for consultation can vary widely between housing organisations, as do the issues on which consultation is required and the interpretation of what constitutes a 'major change'. Major renovation works would certainly count, but during one interview, it emerged that there had been no consultation with residents over plans to upgrade their accommodation or move residents to new dwellings.

Another almshouse resident interviewed felt that attitudes would have to change in the future, as the people coming into almshouses change. She had lived in a housing association flat before moving into the almshouse, which is a modern building in a pleasant inner suburb of a large town. She discussed the changing role of women during the century (she had worked before retirement). There was only one person now resident in the scheme whom she described as being of "lowly status", by which term she clearly meant the image of 'deserving poor' which the word *almsperson* brings to mind. The oldest resident there could still remember the

days when they paid no rent. She reflected that “the experience of people living in almshouses now has changed”, and said that in earlier years she would never have imagined herself moving into an almshouse, even though she was very happy with her flat. She described the trustees as “charming people”, mostly ladies from an upper middle-class background, who “intend to visit but they don’t actually come very often”. She described the prevailing ethos as being “they make the decisions and we accept the charity”. She and at least one other resident on the scheme would like to feel more informed and involved about what was going on, as would be their right in other social housing.

What happens if residents are unhappy? Complaints procedures and access to the housing ombudsman

Alongside the growing emphasis on tenant rights has come the need for clear complaints procedures and access to a housing ombudsman, and these are now recommended in *Standards of almshouse management*, with a suggested model complaints procedure.

Under the 1996 Housing Act, almshouse charities registered as housing associations must become members of an approved ombudsman scheme. Even almshouse charities which succeed in deregistering as housing associations will need to keep up such membership. Roger Jefferies, the Independent Housing Ombudsman, acknowledged that this may not be popular with almshouse trustees:

I know that a number of smaller almshouses will be seeking to deregister. The Housing Act, nevertheless, requires them to remain in membership of the Ombudsman Scheme thereafter. This may not be welcome by some. But, taking a wider view, I hope that many will see continuing access to the ombudsman as a useful service for their residents and as an insurance against disputes. (Almshouse Association, 1996/97)

There is a problem in using complaints to judge housing management performance. Few complaints may mean that everything is going well, but they can also mean that tenants or residents don’t know how to complain, or are afraid to complain. Older people generally complain less than other groups. For this reason, the ombudsman service does not

make judgements about housing organisations which generate more complaints; it is more interested in how the organisation responds.

The ombudsman service had dealt with only 13 complaints about almshouse management from 1994 to 1997, “nearly all of which were resolved locally ... through local settlement, mediation and arbitration” (Almshouse Association, 1996/97). By March 1999 the number had risen to 20, an average of only four a year from around 600 almshouse RSLs. These came from all over the country and covered a wide range of issues. Most have been resolved amicably, a few were not pursued, and a few were outside the jurisdiction of the ombudsman.

How much do almshouse residents pay? Rents, contributions and service charges

Although almshouse residents have fewer legal rights than council or housing association tenants, they generally pay less for their housing. However, they do pay significant amounts, unlike almshouse residents in the past.

Because almshouse residents are ‘beneficiaries’, not tenants, the weekly charges which they pay cannot be called ‘rent’, because paying ‘rent’ confers tenancy rights. For this reason, almshouse residents pay what is called ‘weekly maintenance contributions’ (WMC).

Traditionally, almshouse residents paid nothing at all; many almshouse charities also used to make small grants for items such as clothing or fuel, or payment in kind: examples include money for cloaks (Corsham), ‘butter on fish days’, flour and a gallon of beer a week (Plymouth) and money (twelve shillings and sixpence, or 62p) on New Year’s Day (Tiverton). Some paid small pensions to residents, in the days before social security benefits: this is why residents of the Royal Hospital, Chelsea, which is an almshouse, are still known as Chelsea Pensioners. Few almshouse charities still make such payments to residents.

Most almshouse charities started to charge WMC in the period after the Second World War and the foundation of the Almshouse Association, which encouraged member charities to modernise their

almshouses and make proper financial provision for repairs and maintenance. The payment of WMC also made almshouse residents eligible for State help with their housing costs through the precursors to what is now Housing Benefit.

The reference to maintenance in the term weekly maintenance contribution is a little misleading. As well as maintenance, it can also cover loan repayments (for renovation or new-build), and housing management costs (eg, rent collection Giro charges). This means that it covers the same things as housing association or council rents, not just maintenance.

All the almshouses studied during the research charged WMC. The Almshouse Association confirmed that almost all member charities now make some charge.

Although almshouse charities seek the Rent Officer's informal assessment of the 'equivalent fair rent', to assist them in determining the level of WMC, they often choose to charge less. For example, the new almshouses in Totnes (referred to in Chapter 2) charge only half the equivalent fair rent level. The research included interviews with two clerks to the trustees who between them manage nearly all the almshouses in Exeter. Their endowment investment income is used to subsidise the WMCs, which range from £27.50 to £42 per week, approximately two thirds of the equivalent fair rents. Other charges such as water rates, heating and hot water are also included in the WMC, so their housing is cheaper than social rented housing in Exeter. Both clerks told us that the Charity Commission would not approve of them charging higher WMCs than they need and making a profit or surplus, although they are expected to build up reserves against future maintenance liabilities.

Almshouses are liable for council tax, so residents are eligible for means-tested council tax benefit, and Housing Benefit towards the WMC. Almshouse residents are treated in the same way as other tenants; benefit entitlement does not depend on having a legal tenancy, only on occupancy.

Of almshouse residents interviewed, most described their WMC as "rent". One said that "You can't expect to live here and not pay rent" and clearly

looked on the almshouse as being similar to a council tenancy. She had moved into the almshouse flat after her husband died; they had bought their council house but the house and garden were now too much for her to manage. Another thought it was called a charge, not rent, because it didn't meet the full costs of the housing and was subsidised by the almshouse charity. She knew the rent was less than housing association or council flats, and heating and water rates are included: "I accept the form of charity that this is".

Almshouse applicants, residents and equal opportunities

The Almshouse Residents' Guarantee emphasised the Corporation's statutory duty by the 1988 amendment to Section 71 of the 1976 Race Relations Act which:

... requires The Housing Corporation to have regard to the need to eliminate unlawful racial discrimination and to promote equality of opportunity and good relations between persons of different racial groups, in the exercise of all its functions. (Housing Corporation, 1989, p 5)

Legally, almshouse charities are partially exempt from the provision of the 1976 Act "where it conflicts with the provision of the governing instrument" (Housing Corporation, 1989, p 5). This overrides The Housing Corporation's duty to promote equality of opportunity among the housing organisations which it supervises.

As the guidance from the Almshouse Association explains, almshouse charities are, in their words, 'protected' from the provisions of the 1976 Race Relations Act:

... where they are required, under the terms of their governing instrument, to confer benefit on a particular racial group (defined by reference to race, nationality, or ethnic or national origins but not colour) and publish notices relating to such benefit. (Almshouse Association, 1998, p 18)

Almshouse trustees are also exempt from the 1975 Sex Discrimination Act if the almshouse is for one gender.

For a Corporation-registered almshouse charity, the Corporation:

... expects it to demonstrate its commitment to Equal Opportunities ... in a policy which states that the trustees are opposed to discrimination on the grounds of race, gender and disability in so far as its governing instrument will allow. (Almshouse Association, 1998, p 18)

The Almshouse Residents' Guarantee

The Housing Corporation has a duty to implement the rights of tenants and residents of housing associations and other RSLs.

To fulfil this obligation, statutory guidance has been issued in the form of Guarantees for various classes of residents and tenants, including one for almshouse residents (Housing Corporation, 1989). These Guarantees seek to encourage good practice, especially in the absence of defined legal rights: the same mechanism is used to strengthen the position of other residents who lack full tenancy rights, such as people with 'special needs' living in shared supported housing. The Corporation consulted the Almshouse Association before implementing the Guarantee, which was approved by the Secretary of State.

The Almshouse Residents' Guarantee only applied to those almshouse charities registered with The Housing Corporation. It did not apply to those which had never registered. The Almshouse Guarantee has now been replaced and superseded by an agreement that almshouse charities should abide by the *Standards of almshouse management* (1998).

Conclusions

This chapter has shown the ways in which almshouse residents are in a rather different position to people living in other forms of housing. Fortunately, the revised *Standards of almshouse management* has now provided guidance and advice to almshouse charities as to how they should manage their housing to minimise the disadvantages which could result from the lack of tenancy rights.

6

Not just for older people: using almshouses for families and younger people

A new role for almshouses

This chapter focuses on almshouses that have found a new role in providing much-needed housing in both rural and urban areas, not for older people, but for families, young single people and middle-aged people. They illustrate ways of overcoming the problems, highlighted in previous chapters, of almshouses in poor condition, inappropriate location or of unsuitable design to suit the needs of older people. Trustees have been imaginative and forward-looking, prepared to work in partnership with other organisations in order to bring fresh life to almshouses which in some cases have been empty and in poor repair for years.

In all these examples, housing associations have played a key role: in the development process; in obtaining finance for the building works; in housing management. In a few cases, the involvement of housing associations has also overcome the disadvantages of the lack of security of tenure discussed in Chapter 5, and the almshouses are now let on assured or shorthold tenancies. In many cases, local authorities have also been important in a variety of ways: finding a solution; linking almshouses and housing associations; funding; and nominating residents.

Almshouses for younger single people

The **St Nicholas with Burton Almshouses** are situated in the centre of Bristol in King Street, next door to the Theatre Royal. The almshouses were originally provided for deserving people of good character and other older people; they now house homeless young people.

Today, the area is primarily an area for commerce and entertainment, rather than a residential area, with offices, pubs and restaurants as well as the theatre. The almshouses belong to the Society of Merchant Venturers, which is comparable to a London livery company; they were empty from 1992 until their reopening in 1997. Parts of the building date back to the 17th century and the almshouses are Grade II* listed and an important part of an historic street scene next to the waterfront.

Since about 1990, housing associations have been approaching the Society to discuss alternative uses for the buildings. Bristol has a particular problem with people living on the streets (recognised by central government when it awarded Bristol the first Rough Sleepers Initiative funding outside London); many of the rough sleepers are young people. Voluntary organisations and the City Council have worked together, with support from the business community, to provide a range of housing and support services for single homeless people. The almshouses seemed a good location for young single people, but unsuitable for their previous older residents.

Solon South West Housing Association's offices are opposite the almshouses; their director contacted the Treasurer of the Society of Merchant Venturers to discuss possible ways to bring the almshouses back into use. Some of the trustees had been thinking of selling or leasing the building for use as a restaurant, but others wanted to keep it available for housing, as under the terms of the original bequest. As the Treasurer said:

There were all sorts of plans, all of which fortunately went into the buffers. They were not what we were given the

almshouses for. (Cheshyre, 1997, p 32)

After a great deal of negotiation, the Society of Merchant Venturers and the housing association succeeded in putting together a proposal to convert the existing dwellings into eight one-bedroom self-contained flats for young people, using short-life grant from The Housing Corporation and funding from the Society of Merchant Venturers. The building works were completed and the flats occupied early in 1997.

The original façade and roof timbers date from 1656; the interior of the building was damaged during air raids in the war, and the rear portion was rebuilt in the 1960s. Part of the Roman city wall is located in the rear garden. A beautiful plaster frieze ceiling with original oak beams and lintels has survived in the entrance hall. English Heritage, the City Council conservation officers and the Society for the Protection of Ancient Buildings were consulted during the renovation works, and listed building consent obtained; the Merchant Venturers also took a keen interest during the building works.

Solon has a six-year lease and will pay rent to the Society of Merchant Venturers; at the end of the lease the building will revert to them. The housing is let and managed by Priority Youth Housing Association, a local housing association which specialises in supported housing for young people. They are using the almshouses as 'move-on' housing for young people progressing from shared houses into independent accommodation. Housing Corporation revenue funding also pays for a support worker to enable residents to make the transition towards independence.

The almshouses were originally for 'poor persons of good character of the City of Bristol'. The Society of Merchant Venturers is not involved in resident selection or housing management; this is delegated to Priority, but Solon makes an annual report to the Society's almshouse committee on how the project is running, including information on matters such as occupancy levels.

The Society had to obtain consent from the Charity Commission to change the provision of the trust deed to allow it to house young homeless people and for management by a housing association. This consent was obtained, showing that it is possible to

reinterpret the almshouse Scheme in the light of today's housing needs.

Mr Hill's Almshouses (known as Stoneleigh House) is another almshouse in Bristol which has changed its use to house younger single people. The almshouses have been sold to the Carr-Gomm Society, a housing association and charity specialising in housing and support for single homeless people. This move is in line with current Housing Corporation policy to re-use existing dwellings for more appropriate client groups. The Charity Commission had to agree the sale, even though it was to another charity, but this consent was eventually obtained.

As with the Merchant Venturers example, the location is ideally suited to younger single people, being a stone's throw from one of the main shopping areas of the city. The original HAG allocated to Mr Hill's (also a registered housing association) has been recycled for the Carr-Gomm scheme, and the almshouses have been improved to suit the requirements of the new residents.

The almshouses are popular with residents, who appreciate their charm and their convenient location. The residents have support from a visiting support worker; they have assured tenancies.

As part of a complex almshouse redevelopment scheme in Bristol (discussed further in Chapter 7), proceeds from the disposal of Mr Hill's and other inner-city almshouses are being used to fund a new almshouse development in an inner suburb.

Both the above examples are inner-city almshouses, but the next example is a very rural almshouse which has also seen a change of use to house single people: **Leigh Delamere Almshouses** in Wiltshire. Leigh Delamere is probably best known to travellers along the M4 for its motorway service station, yet only a stone's throw from the motorway is another innovative almshouse project. Leigh Delamere is a tiny settlement: a church, a farm, the vicarage and the almshouses. Although adjacent to the motorway and only about four miles from Chippenham, it is very isolated for anyone without their own transport.

Discussions have taken place over a number of years to find a solution to the row of empty almshouses

in the village. The main author of this report tried to start something back in the mid-1980s when working for North Wiltshire District Council; Hanover Housing Association, featured below, tried to find a solution to the empty and derelict almshouses in the early 1990s, but was unable to make any progress. They could not get HAG from either The Housing Corporation or the local authority, and The Housing Corporation would not register the almshouse charity as a housing association.

The properties have now been improved and converted into six ground and first floor flats by Cooperative Homes Services (CHS) from Reading, a housing association which also works with housing co-ops. CHS had previously worked with almshouse charities in East Anglia. CHS received an allocation of Housing Corporation funding for a 'short-life' improvement in North Wiltshire, and the local authority suggested using it for the empty almshouses.

The development faced a number of legal problems over the lease and management agreement, but these were finally overcome in 1998. The trustees have leased the almshouses to CHS for six years and have a management agreement with CHS for housing management. North Wiltshire has full nomination rights, and the almshouses are let on assured shorthold tenancies (shortholds because of the short-life funding). The almshouses have now been let to single people from the council's housing list.

There is a mixed community of young and middle-aged people who seem to have settled in well, turning the wilderness into gardens and growing their own vegetables. Some people refused the offer of housing there because it was too out of the way or too far from work, but others were particularly pleased to have the opportunity to move somewhere quiet and rural. CHS's housing manager said the new residents were "absolutely delighted" with their new homes, though the manager was concerned that keeping the old iron windows instead of replacing them with double-glazing could cause condensation problems in the winter.

All the above examples have been unsuitable for older people because of their location as well as their design: the next example is a group of almshouses

which are very well located. They are also beautiful buildings (confirmed by their Grade I listing), but epitomise many of the design and conservation problems discussed in Chapter 3.

A unique collection of 17th-century buildings, **Lady Margaret Hungerford Almshouses**, are situated close to the centre of the attractive market town of Corsham, and adjacent to the grounds of Corsham Court, the seat of Lord Methuen.

There are six one-up one-down gabled cottages in a terrace, a house for the warden, a schoolroom with its original furniture, and outbuildings consisting of a coachhouse and stable block. Dating from 1668, the buildings are all Grade I listed, except the outbuildings which are Grade II.

Most of the almshouses have been empty for many years; the last resident died in 1996. Although they look delightful, they have been increasingly difficult to let to older people. Each cottage has a very steep narrow winding staircase to reach the first floor bedroom and bathroom. The kitchens are tiny and heating is by open fires. The attractive arcaded covered walkway at the back makes the ground floor rooms rather dark. The local authority has built new sheltered housing in Corsham, and there is no demand from older people for the almshouses.

To overcome these problems, the trustees decided to re-use the almshouses for single people below pension age (but not for young people, as they fear for the treatment of a Grade I listed building). They have in mind single people and couples without children, aged between about 40 and 60. This group can be in great housing need as they are not usually prioritised for social rented housing; many are coming out of tied housing linked to their jobs, or have been lodgers or carers with no security of tenure. In 1993, trustees researched local housing need by asking the council to trawl through their waiting list. They found 70 single people under pension age seeking one-bed accommodation, and only 13 older people (over 60). Most of the older people also needed ground floor accommodation, so could not have managed the stairs in the almshouses.

There are five trustees, with a wealth of experience between them: Lord Methuen (the patron), two trustees appointed by Lord Methuen, and two

appointed by the parish council. One of the trustees is a descendant of the founder – a barrister and recorder, he has dealt with English Heritage over his own properties. Another is a district councillor and former Labour parliamentary candidate, knowledgeable about housing policy and grants. Attempts have been made to obtain funding and renovate the almshouses since the mid-1980s, yet at the time of writing, work is only just starting. The project is due for completion in summer 2000.

Planning consent was obtained, but getting all the funding together took much longer. The plans allow for renovating the six cottages and converting the outbuildings to provide two ground floor and two first floor one-bedroom flats. The warden's flat will be kept for a caretaker/curator for the schoolroom museum. Because the building is of such historic importance, English Heritage required a full historic buildings survey. Unfortunately, although they can require this to be carried out, they do not have to provide funding for it, so the extra costs formed part of an appeal for lottery funding.

The change of use from elderly to single people has been achieved by an imaginative partnership between the almshouse charity, the local authority and the local authority-sponsored housing association with an unusual combination of funding sources. The one-bedroom dwellings are costing about £50,000 each (which is not dissimilar to The Housing Corporation cost limits for new or refurbished dwellings of this size in this area).

Funding for the project is coming from many sources (though primarily the Lottery and the council):

- National Lottery Heritage Funding (because of the museum and public access);
- North Wiltshire District Council mandatory improvement grant (because the dwellings are unfit);
- North Wiltshire District Council Section 24 grant (from some of the proceeds of the voluntary transfer of their council housing to North Wiltshire Housing Association);
- English Heritage;
- small grants from various charitable trusts (including the Mercers' Company, as Lady Margaret Hungerford, the founder, also had links with them).

Putting all this together has taken many years of hard work from the trustees and their professional advisers, and the interaction of the different grant and planning applications has been complex. They often had the feeling of moving one step forward but two steps back, waiting for agreement from different organisations, and not knowing how much funding they would need, or get, from each one.

Interestingly, the trustees rejected obtaining grant from The Housing Corporation although they are working in partnership with both the local authority and the North Wiltshire Housing Association (NWHHA). They echoed the views of many people involved in running almshouses (clerks, trustees and others) when they said that they didn't want the almshouses 'taken over' by a housing association; they wanted them to stay under the control of local people and to be of benefit to the people of Corsham.

However, they will be using NWHHA to let and manage the housing, recognising that they do not have the necessary professional expertise. One of the trustees sits on the housing association board; as the association manages most of the social rented housing in the district, the trustees are confident that a local management presence will remain. They did not want to have the almshouses managed by a housing association with no local staff or offices.

There was some discussion about how to meet the charity 'Scheme' (which specifies that residents should be 'poor and needy', but sets no age restriction), yet ensure that the historic building was kept in good condition and not damaged by its residents. One suggestion was made that as the buildings were listed, they should be let to young professionals, the assumption being that they would respect the buildings. However, this would not have met the charity's criteria as such people were unlikely to have been 'poor and needy'. Others argued that people on the housing list would also respect the buildings. It was agreed that lettings would be on the basis of 100% nominations through NWHHA. The trustees have reserved the right to choose between applicants submitted by NWHHA to them, in order to check on their suitability for living in a listed building.

Lady Florence Stalling's Charity Almshouse is another building for young and middle-aged single people and couples, renovated in partnership with Knightstone Housing Association. Unlike Corsham, although it is Grade II* listed and parts of the building date back to 1478, a journalist who visited before the works started said that:

... a passer-by would not give a second glance at what appears to be a tumbledown row of cottages waiting for the roof to fall in. (Chesshyre, 1997, p 34)

The almshouse is a two-storey listed building in the churchyard in the centre of Yatton, an expanded commuter village near Weston super Mare. Lady Florence Stalling died in 1620: she left various bequests for the poor of the area, and:

... also I give devise and appoint the Church House of Yatton aforesaid for the better relief and maintenance of the poor of the said parish of Yatton. (Keystone Historic Buildings Consultants, 1995, p 10)

Throughout its history, the building was let out as separate rooms, often housing younger people and sometimes whole families:

For instance in 1824, Tripp's family was to be removed to another room to accommodate Dyer's family... [In the 1851 Census] there were 8 households, only 2 actually defined as pauper. Some had wives and families of up to 5 children. Three heads of household were agricultural labourers of an age to work, one a sawyer of 60. (Keystone Historic Buildings Consultants, 1995, pp 12-13)

This continued into the present century:

In 1924 a family of eleven was living in two rooms in the Church House. The minute books for 1922 record that a Mrs Parsons allowed her daughter, her husband and 8 children [the Carpenter family] to live in a room there, and it was proposed that the relieving officer should move them. They declined to go to the workhouse, and their presence was regularised by giving this family, the Carpenters, another room. They were still there, in overcrowded conditions, two years later, while other rooms were only being used to store furniture. (Keystone Historic Buildings Consultants, 1995, p 14)

By the 1950s, the almshouses were condemned as unfit, "but were still in use for want of alternative accommodation"; some modernisation was carried out in 1957. By the 1980s, as occupants moved out

or died, they were not replaced and the last occupant died in about 1989 (Keystone Historic Buildings Consultants, 1995, pp 15-16).

Various attempts were made to obtain funding, planning permission and listed building consent from 1986 onwards (when new trustees were appointed and a new Scheme drawn up). There were many setbacks and arguments over design and density, especially when it was discovered that the row of almshouses had been built inside the shell of the 15th-century church house, which made it of much greater historical significance:

The medieval church house was a focus of social life. It provided facilities for brewing and baking for the festivities known as Church Ales, which were an important revenue for the upkeep of the parish church as well as entertainment for the parishioners. It could also be hired privately. It continued as an institution after the Reformation and through Elizabeth I's reign, despite Puritan dislike, but thereafter generally tended to become a poor-house as here, or was sold off, often becoming a public house. (Keystone Historic Buildings Consultants, 1995, p 9)

Eventually, all the necessary permissions and funding were obtained and the building work started in early 1998, with completion by August 1998. There are four flats, let to people on either Knightstone's or North Somerset District Council's housing lists. There is an agreement to consult with the trustees and this has run smoothly. Trustees also retain the right to propose applicants from the village for one of the four dwellings (ie, a 25% nomination agreement). Current residents include a middle-aged couple and three younger single men. The almshouses are managed by Knightstone and are let on assured tenancies, with a standard tenancy agreement but some additions because of the listing of the old building. For example, there are restrictions on the types of paint which can be used on the horsehair plaster walls. Rents are set according to Knightstone's points policy and are around £55 per week. The charity leased the almshouses to Knightstone on a long lease and became a 'relief in need charity' on the proceeds, able to make small grants to local residents.

Almshouses for families

The problem of isolated rural almshouses, now

unsuitable for older people because of changing conditions and demand, can also be overcome by letting to families.

Whetstone's Almshouses in Somerset comprises a group of two- and three-bedroom cottages, suitable for families and at times used for families during their history.

The almshouses are situated in the small village of Ilton, near Ilminster. They were founded by John Whetstone in 1633 for 'poor, weak impotent and distressed people'. By 1991 they consisted of 10 two-storey cottages, by now Grade II* listed buildings, with only two occupied, and in a state of severe disrepair with aged trustees who could no longer cope.

The local vicar was reluctant to see housing lost to the village. He found new trustees, mostly younger retired people, who contacted one of the Almshouse Association panel of architects, Stone and Partners in Taunton, where one of the partners has 30 years' experience of almshouse projects. First of all the trustees tried to obtain funding themselves. However, The Housing Corporation refused to register the almshouse charity as a housing association. Then the architect suggested a link with Knightstone Housing Association, as Knightstone had just refurbished some almshouses in nearby Wells.

The almshouse charity still owns the buildings, but they are now leased to Knightstone on a 125-year lease, for which Knightstone paid £15,000. The Charity Commission agreed to the lease; funding came from South Somerset District Council (local authority HAG) and some funding from the Almshouse Association. The trustees and the village didn't want to lose control completely and sell the almshouses to Knightstone, so the lease suits everyone. Also, the charity owns a one-acre field adjacent to the almshouses, which may be suitable for further housing.

The 10 original cottages were converted into six larger dwellings: three with two bedrooms, two with one bedroom and one three-bedroom cottage. South Somerset District Council were consulted: they said there were plenty of older people's bungalows in the Ilton area and what was needed

was family housing. The trustees and the Charity Commission agreed to this.

The architect insisted on a full structural survey to see exactly what had to be done and to avoid cost over-runs, as any over-run would have had to be funded by Knightstone. The work was completed close to budget, and the local authority conservation department proved very helpful. There were potential planning problems over making a gap in a listed wall to access the parking, but the housing department helped over this, arguing that parking was necessary for family accommodation.

Because the almshouses are leased by the almshouse charity to the housing association, they are let on assured tenancies, with the same security of tenure as all housing association tenants. There were no restrictions imposed by the trustees, who now use the £15,000 to fund a 'relief in need' charity, making small grants. There are a few minor differences to Knightstone's standard assured tenancy agreement, but these are because of the historic nature of the buildings rather than the restrictions of the charity rules. For example, there are bats in the attics so an additional clause states that tenants cannot use the loft space or harm the bats (because they are protected). Because of the listing, another clause prohibits tenants from painting the outside windows.

Two of the houses are now let to families with teenage children, the others to older couples or single people. Three were local people from the village (including those who had lived in the almshouses before the renovation works); three were incomers, although on South Somerset's housing list.

Knightstone's housing manager said there were no problems with getting suitable nominations, because of the good relationship they have with the district council. She said that it is important that prospective tenants really want to live in the almshouses, rather than being pushed into going there without much choice. The almshouses are in a tiny village, so it is essential that people are happy about living there and have their own transport, otherwise they would be completely isolated. Because the cottages date back to the 16th century, they do not meet modern building standards. There are no private rear gardens, and when people come out of their front doors they are very near their neighbours. This means

that people need to get on well together, or it could be a nightmare with plenty of scope for neighbour problems. Fortunately, the local authority has been sensitive about nominations.

One couple had been living in insecure private rented housing in the district: they had moved nine times in five years, and are delighted to be settled in the almshouses. All these moves had made it impossible to find a regular job; since moving to the almshouses in 1995, the husband found work. They love the old building, even thought it has certain disadvantages, such as poor sound insulation. After so much insecurity, they were pleased to have the security of an assured tenancy. When they were told that most almshouse residents do not enjoy this, they were adamant that after their history of housing insecurity, they would not have accepted the local authority nomination to the almshouse if it had not been an assured tenancy.

Shrewton Flood Charities is another unusual almshouse charity because these two-bedroom cottages have always been inhabited by families.

The origins of the charity are best described by reproducing the wording from the cast iron plaques which are prominently sited on the front of each set of cottages:

THESE COTTAGES
BUILDIED IN THE YEAR OF OUR LORD
1842
FROM A PORTION OF THE FUND SUBSCRIBED
BY THE PUBLIC
TO REPAIR THE LOSSES SUSTAINED BY THE
POOR
OF THIS AND NEIGHBOURING PARISHES IN
THE GREAT FLOOD OF
1841
ARE VESTED IN THE NAMES OF
TWELVE TRUSTEES
WHO SHALL LET THEM TO THE BEST
ADVANTAGE
AND AFTER RESERVING OUT OF THE RENTS
A SUM SUFFICIENT TO MAINTAIN THE PREMISES
IN GOOD REPAIR
SHALL EXPEND THE REMAINDER IN
FUEL AND CLOTHING
AND DISTRIBUTE THE SAME AMONGST THE
POOR OF THE
SAID PARISHES
ON THE 16 DAY OF JANUARY FOR EVER
BEING THE ANNIVERSARY OF THAT AWFUL
VISITATION
[Plaque on the front of the
Flood Charity cottages]

There are 12 cottages in all, in terraces of between two and four, on four sites in the villages of Shrewton, Maddington, Orcheston and Tilshead, on the edge of Salisbury plain near Amesbury in Wiltshire. Some years ago, the local trustees found that they were unable to carry on and deal with the deteriorating housing, so they contacted Hanover Housing Association.

Hanover became corporate trustees in 1991, when only seven cottages were occupied; one was in such a poor state that the local authority had placed a Closing Order on it. Apparently the charity had previously owned more cottages in the area, but some had been sold off to raise money to pay for repairs on others. Hanover obtained HAG from both the local authority and The Housing Corporation, and borrowed money on behalf of the charity to meet the costs not covered by grant; the

charity was too small to be able to borrow money on its own, without its link with Hanover.

Four of the cob cottages at Orcheston have been renovated: their listing and cob construction complicated the refurbishment and led to increased costs. The unlisted pair of cottages at Maddington have been rebuilt on their original 'footprint'. The original costs were considerably over Housing Corporation cost limits, so 'Design and Build' contracts were negotiated with a local builder to save money. This is a good example of a housing association with wide development experience being able to cut costs, compared with the traditional route using an architect and tendering the building contract. The cottages were completed in 1995/96, so it took over four years from Hanover taking over as corporate trustees, due to the time-scale over HAG funding and registration.

All 12 cottages are now occupied, but unlike Whetstone, where Knightstone has a lease and can use assured tenancies, Hanover, as the corporate trustee, must let them on licences. Residents have a written agreement with terms similar to other Hanover tenancies, but with the legal differences outlined in Chapter 5. Staff stress the differences between almshouse residents and tenants when they make new lettings, and this has never put anyone off moving in.

Lettings have been to families nominated by the district council. There is a formal 100% nominations agreement with the council on the six properties renovated using HAG, but Hanover uses nominations for lettings on all 12 cottages. This suits Hanover as they mainly house older people, so do not keep a 'general needs' housing waiting list. There has been no problem finding suitable residents; fortunately, the 'area of benefit' of the Flood Charity covers a number of local parishes. This dates back to the establishment of the charity over the area affected by the great flood, and was later extended to include the local town of Amesbury. Lettings would be more difficult if the area of benefit were narrower, such as only one village.

Hanover think that if the cottages were for older people, they would be more difficult to let because some of them have no public transport or shops

and it would be difficult to offer support such as a warden service (although a community alarm system would be possible). There has been no problem with lettings or transfers, although there is a bigger turnover on one group of cottages as they have not been modernised recently and front on to a busy main road. If the council nominates homeless families, they have an 'only one reasonable offer' policy so residents may feel pressurised into accepting; this has led to some turnover. There have been a few transfers and exchanges out where residents needed larger accommodation; the good relationship with the council has meant that this has gone smoothly, despite the residents' lack of a legal right to transfer or exchange.

Weekly maintenance charges are now much higher than before; the trust's previous policy of low charges meant that they did not accumulate enough to maintain the properties, hence their disrepair. Future charges will be calculated according to Hanover's points-based rent setting policy. At present some are on equivalent fair rents, but for some of the cottages, charges are higher because of needing to recover the costs of the works. Charges are calculated on a monthly basis (as this is Hanover's general policy) and can be paid by bank standing order or Post Office giro; they range from £180 to £300 per month.

During a research interview, one almshouse resident said she loved her cottage. She was a pregnant young woman with a toddler. She worked locally and her mother lived in the area. She had felt lucky to get one of the cottages as otherwise she would have been offered council housing further away. There seemed no suggestion of stigma, or of being a recipient of 'charity'. In fact they offered greater perceived security of tenure than, for example, farmworkers' tied cottages; one resident had been rehoused from such tied accommodation. A local owner-occupier commented that to him, the Flood Cottages seemed like council housing, being allocated to people from outside the village who were working, and managed by a housing association. They did not fit his image of almshouses at all, which would be for older village people, but he was not unhappy about this use of the Flood Charity cottages.

Summary

This chapter has shown the different uses that can be made of almshouses which, because of design or location, are no longer suitable for older people. The examples show the benefits of working in partnership and seeking new solutions that draw on the expertise of a wide range of organisations.

Almshouses for older people: new developments and extra care

Like other providers of housing for older people, almshouse charities are facing a future where people are living longer and may become frailer, needing more care and support than can be given in ordinary housing, with or without a warden. In common with local authorities and housing associations, some of their housing is not ideally suited to the needs of frailer residents.

In the face of this challenge, a number of almshouse charities have been renovating and expanding their existing housing, and developing various models of extra-care housing, some on existing sites and some on new sites after selling less suitable almshouses. The trustees of these almshouse charities have sought creative ways to solve the problems of properties in poor condition and the needs of frail almshouse residents by working in partnership with housing associations, and local authority housing and social services departments.

Bucklehaven Almshouses, Charlton Kings, near Cheltenham, is an example of an almshouse charity which has provided more housing to a modern standard by the conversion of bedsit units into one-bedroom flats and the construction of additional new-build flats in the grounds. The original group of 11 bedsits were built about a hundred years ago by a local benefactor, Charles Buckle. They were modernised during the inter-war years, but nothing had been done since then. They had unsatisfactory heating (open fires and old-fashioned night storage heaters) and hip baths. The trustees realised that the almshouses needed upgrading, but could not afford to upgrade them with their limited reserves.

They also wanted to re-interpret the aims of the founder to meet the needs of the late 20th century. As the chairman of the trustees, a retired builder, said:

“As trustees we were conscious of the fact that we had a lot of land, and we felt that we should use this good site to increase the number of almshouses. The original ones were built by Charles Buckle for 55 year olds and over, but he didn’t leave much money to do anything with – just enough to give residents a little gift token at Christmas.”

All were previously let on low weekly charges (£56 per month). Two residents were in their nineties, and four or five in their eighties; one had lived there for over 30 years. One resident lived rent-free as a ‘good neighbour’ to keep an eye on the others.

The trustees appointed an architect and decided to carry out a two-stage redevelopment in partnership with Sovereign Housing Association. Phase One was the construction of 14 new-build flats on land adjacent to the bedsits, completed in June 1996. Phase Two, completed in October 1996, was the conversion of the bedsits into 12 one-bed flats. This meant that existing residents could be moved into the new-build dwellings, leaving their old bedsits vacant for the Phase Two conversion works. The flats now all have one bedroom, living room, kitchen and bathroom/shower, with gas central heating. They are connected to a central community alarm but do not have a warden, as Sovereign considered this would be uneconomic with only 26 units.

Local authority support was important: Sovereign obtained Department of the Environment Partnership Funding and local authority HAG, and

raised a loan for the rest. Most of the applicants for the new dwellings have come via the local authority or other housing associations. Cheltenham Borough Council have a formal agreement for 75% nominations. Although the weekly maintenance charge has now increased to £60 per week, most residents receive Housing Benefit so in practice this has not been a problem, although Sovereign's housing manager had to spend time talking this through and giving benefit advice to residents.

Sovereign now lease the flats from the almshouse charity for a peppercorn rent for 30 years (the life of the funding). Unlike some of the examples in Chapter 6, the trustees had problems getting their Scheme (rules) changed by the Charity Commission, who were adamant that the trustees maintained control at all times. This was achieved by keeping 25% nominations for the trustees and a veto over applicants.

The Scheme is in an attractive location, and on a bus route, but is half a mile from shops. Sovereign had originally wanted to grant tenancies, but the almshouse trustees insisted on licences. Sovereign has always treated residents as if they were tenants, and explains the position clearly to people applying for housing. Their housing manager feared that the lack of legal security might put some people off accepting the almshouses, but this has not happened in practice; perhaps the involvement of a housing association as managing agent has also reassured prospective residents.

One couple, new residents, were enthusiastic about the peaceful location of their flat, contrasting it with their previous housing on a council estate they described as 'noisy'. They didn't mind moving from a two-bed to a one-bed flat:

"Our new smaller place is easier to keep clean and we don't miss the room. We were doubtful at first whether the furniture would fit, but it does. It's easier and cosier."

They understood about the change from being secure council tenants, but were not worried about this, feeling confident that the housing association would treat them as if they had security of tenure. The local authority also had the advantage of getting back their two-bedroom council flat to let to someone else in housing need.

The trustees have a right of veto over prospective residents to satisfy the Charity Commission: Sovereign interviews applicants and then the trustees do a home visit. At the time of the research, they had only rejected one local authority nomination. The trustees were happy with the relationship with the housing association, and still visit residents and pay for the TV licences from the charity's funds. The chairman of the trustees extolled the advantages of the partnership with Sovereign:

"We will maintain links with the residents. We've got rid of all the maintenance problems, we've relieved ourselves of that obligation. We will still play a pastoral care role, continuing to visit. We're three men and three women, most of us living within half a mile, and that proximity was deliberate. I visit once a week. If there are any problems, we try to be there to help."

The housing association also finds that this works well: their housing manager described the trustees as "... doing a fantastic job – they visit the residents regularly and listen to them. If anything needs doing, they refer it on to us." He thought that such an arrangement was an ideal form of partnership between housing associations and almshouse charities, and a useful model for the future.

Gloucester Charities Trust is a progressive but ancient almshouse trust (and a registered housing association in its own right), constantly reinterpreting its role. It has moved into the provision of extra-care housing and nursing homes, and extended its role into the wider community with a day centre.

This almshouse trust is one of the oldest in the country, dating back to the 12th century. It provides a fascinating example of both the history and the future of almshouses, from medieval church origins, through royal and municipal links, to its preparation for a continuing role in the 21st century.

The almshouse trust is based on an ancient church site which passed from the church to the burghers of the city on the dissolution of the monasteries. There was also royal patronage. The dissolution of the monasteries took place in the reign of Henry VIII, who was "especially fond of Gloucester, the place of his coronation, re-establishing and endowing the Hospital of St Bartholomew there" (Howson, 1993, p 28).

The trust has converted existing almshouses and conducted a major building programme over the past 15 years to build new sheltered housing, using Housing Corporation grant. It now owns and manages four sheltered housing schemes, all with 24-hour warden cover. There are about 160 residents in 129 flats. In 1993 it opened a 29-bed nursing home, and in 1996 a day centre.

Gloucester Charities Trust is a large well-endowed charity. It owns investment land, two farms (which are let out), financial investments and commercial properties. Managing the charity's considerable assets takes up about half the director's and the trustees' time.

It would appear that the money is being used effectively for its original purpose. The new nursing home gives priority to state-funded residents who are further subsidised by the trust to ensure the highest standards of care. Private fee-payers are accepted, currently about 15%, when vacancies occur and their payment of the full cost helps make the subsidy to the less well-off possible. So this apparently wealthy charity is putting its money into this development, allowing a higher number of low-income people into its nursing home. No public capital funding was involved.

The new day centre is adjacent to the nursing home and right in the centre of the trust grounds. The director commented that:

"... it works brilliantly, cross-fertilising the different groups, bringing the trust alive, providing a meeting ground not only for sheltered residents and others in the community at large, but also to invigorate the nursing home residents in the adjoining building."

The day centre has a capacity of 25 people per day. It provides a hairdressers, assisted bathroom with Arjo bath, and a large common room, which is suitable for occasional concerts with a capacity of up to a hundred people. The trust accepts social services referrals, but the majority of clients are those in need but for whom State funding is no longer available. The trust subsidy of day care is considerable.

At the time of research, the charity was planning to build a new development for frail older people. The charity is also aware of the need for a scheme

for older mentally infirm people. The trustees are anxious not to avoid projects of this type, which could be seen as more difficult, and only take the easy option.

This almshouse charity is growing in expertise and has now moved beyond its original geographical remit. In order to achieve full occupancy levels of its expanding facilities, it has successfully applied to the Charity Commission to widen its area of benefit beyond the boundaries of Gloucester to the whole of the county.

The director believes that almshouses play a role beyond what other social landlords can provide:

"... a sort of spiritual role and service, centred round a special place. We have a 15th-century chapel, and there is a carol service on there tonight. The trust has been going for a thousand years, and the trustees plan to be continuing for another thousand years."

The director and trustees are keen to reinterpret their role and use their investments to extend their work: "We have a charter to follow. Recently, for instance, we held a seminar for trustees on the way ahead in the 21st century."

Of the 18 trustees, half are appointed by the city of Gloucester (seven from the local authority and two from the Freemen of Gloucester). Some have been trustees for a number of years, and most are either professional people or recently retired. They are typically doctors, solicitors, bankers, farmers and builders; the average age is in the sixties.

The director, who has a background in Her Majesty's Forces, described them as "energetic and far-sighted ... a good mix of people. When the nursing home started, a doctor and a nurse joined the trustees." He sees a role for larger, professional almshouse charities to help smaller ones by extending their remit and taking smaller charities under their wing. This is one of the reasons they asked the Charity Commission to widen the 'area of benefit' of the trust. As the director said,

"The trustees desire to provide an expertise and excellence in accommodation and care and help others to follow the example, all for the benefit of those in need."

Bristol Municipal Charities is another city-based, well-endowed municipal charity. It owns approximately a hundred almshouse dwellings on four sites, as well as undertaking a wide range of other charitable activities. The charity has a separate body which is an RSL, known as Orchard Homes.

This almshouse charity tackled the problem of an unsuitable building in an inner-city location by moving out to a new site and building a new extra-care development. They raised the funds through sale of redundant almshouses for student accommodation and provided the new housing without public funding.

This is an illustration of the 'urban exodus'. Faced with the problem of almshouses in an unpopular inner-city location, and compounded by their outdated design for an increasingly frail client group, the charity developed a new purpose-built extra-care housing scheme for frail older people in a residential suburb in North Bristol.

Ben Gough House was opened in May 1996. The 40-bedroom scheme is dual registered, providing 30 residential care places and 10 nursing home places. There is a large communal dining room for main meals, a library, a hairdressing room, treatment facilities and a pleasant landscaped garden. Accommodation is split into small 'family' units with their own sitting/breakfast room, assisted bathroom and shower rooms, and individual bedrooms.

This scheme is important because, like a number of forward-looking almshouse charities, Bristol Municipal Charities is acknowledging that the standard almshouse provision is no longer adequate to meet the growing needs of an ageing population. The aspiration of enlightened trustees is to provide accommodation designed to enable residents to live independently as long as possible.

The **St Ambrose Almshouses** project is another example of the urban exodus, moving out of the inner city and into higher care, while re-using inner-city almshouses for other client groups. It also involves the amalgamation of a number of small almshouse charities: in about 1990, clergy in Bristol began to speak about rationalising some of the numerous charitable trusts in the city, and this complex development project involves four Bristol almshouses.

The first three almshouses were all in inner-city locations, and were experiencing difficulties in letting their accommodation. They were no longer popular or suitable for older people, because of their location and design: one group of almshouses have narrow staircases, small windows and dark interiors.

The fourth group of almshouses, in the grounds of St Ambrose churchyard, are in a suburban location, overlooking a park, and are popular with older people. As clerk to the trustees, the local vicar managed the original seven dwellings, and had become aware of the growing need in the parish for more specialised accommodation for frail older people.

Consequently Brunelcare, a local housing association for older people, was approached. A scheme was devised whereby the proceeds of the sale of the first three groups of almshouses, together with a donation from a Bristol charity, a loan and SHG, would both refurbish the seven existing almshouses and fund a new 14 unit extra-care scheme for frail older people in the grounds of the fourth group of almshouses next to St Ambrose church.

The new development, due for completion in Spring 1999, will provide 14 purpose-built one-bedroom flats, providing 24-hour care for residents. The extra-care facilities will enable residents to live independently for as long as they are able to. The new scheme is wheelchair accessible. Together with the existing seven almshouse flats on the site, this will make a significant contribution to housing for frail older people in the area. Due to the proceeds of the various disposals, the availability of free land, and the contribution from the charity, the level of grant from The Housing Corporation is relatively low.

At the same time, the main church hall is being converted to a day care centre for use by the whole community as well as the residents. This will make more economical use of the catering and laundry facilities being provided for the new scheme.

One potential problem was the disruption caused to the existing St Ambrose residents: during the lengthy construction period, their immediate surroundings have become a building site. At the time of the research interviews, their mood was extremely

positive, with one resident remarking: “We can’t wait to get down to B&Q, buy shovels and start helping to build this wonderful new scheme!”

The four almshouse charities have now merged to create the Bristol and Anchor Almshouse Charity and a manager has been appointed to run the new scheme.

Conclusions

This chapter has shown how almshouses can continue to provide appropriate housing for older people. There is scope for upgrading old buildings, providing new buildings, making available additional services and combining the resources of small almshouse charities and the expertise of housing associations. As one trustee said:

“We want to provide the full spectrum of care from the point of entry until people die. We want to look after residents so they won’t have to ‘go elsewhere’.”

The future of almshouses and their role in meeting housing need: solutions and recommendations

This final chapter looks at the role of almshouses into the next millennium. It proposes solutions to the problems identified in Chapters 3, 4 and 5, drawing on the wide variety of innovative developments and good practice described in Chapters 6 and 7.

Do almshouses still have a role?

It is proposed that almshouses do still have a role to play in the provision of social housing to meet people's housing needs, for the following reasons:

- Almshouses display aspects of design and management which are in tune with modern thought and good practice. On the design side, they are usually in small groupings in balanced communities. A number of almshouse charities display a commitment to continuing care from ordinary housing to nursing homes. Many have good links with the local community and a commitment from the trustees to visit and meet with residents.
- Almshouse charities often have their own funding to match Housing Corporation grant or other public funding. This can come from land, investment income, sale of investment property, close links with other charities and contacts with people of influence in the locality.
- Many almshouses are sitting on valuable sites. In some cases the existing almshouses are well-located in central positions which are attractive to older residents. In other cases, the old almshouse buildings are very saleable for alternative uses, in order to raise money to build replacement

almshouse provision elsewhere. Some almshouses are very desirable and can raise significant sums if sold on the open market. Others are particularly well-placed for other groups in need of social housing, such as young people, in line with local authority and Housing Corporation policy on re-use of existing housing stock. If replacement provision is built for older people, this can meet modern standards and provide higher levels of care if necessary.

- Almshouses can widen the choice of housing available to people in need of housing. They can offer the opportunity to live in historic buildings, often with a spiritual dimension or sense of continuity with the past which can be much appreciated by residents of all ages, not just older people. They can offer convenient housing in the centre of the village, town or city, which may not be available in such locations from local authorities or housing associations. Almshouses in suburban or rural areas can suit people who prefer a quieter location; often the council housing in such areas has been depleted by the Right to Buy, and almshouses may provide the only remaining housing in such places. This broadening of choice can be particularly appropriate for people who, for a variety of reasons, may not find themselves best suited to mainstream social rented housing (such as on housing estates or in large sheltered housing developments).

However, almshouse charities cannot maximise their contribution to the housing and care needs of the community without working in partnership with other organisations.

There is a need to continue to move forward in ideas on both housing development and housing management, as discussed in previous chapters. The lack of security of tenure and other residents' rights can be considered to disadvantage almshouse residents, but there are ways of ameliorating this generally technical disadvantage, by agreeing to adhere to recommended good practice where tenancies are not possible. Leasing arrangements with housing associations allows the use of assured and shorthold tenancies. Partnerships with housing associations can also enable almshouse charities to provide housing for groups which the almshouse charity would not wish to manage itself, such as young single people.

Broader constraints

However, the continuing role of almshouses into the next millennium will be subject to the broader constraints which affect them and their partners and regulators as much, if not more, than other small providers of housing and social care:

- capital and revenue funding problems
- governance issues
- conservation and value for money.

Capital and revenue funding problems

Public funding for housing capital expenditure is always limited, and there is increasing competition for scarce development funding (Best, 1997). Central and local government priorities change over time, and almshouses may not always fit these priorities for a variety of reasons which have been explored in previous chapters. These may include security of tenure and style of management, as well as location or condition of stock. There are a number of discussions taking place within the almshouse movement and its members on the question of licences, and some debate on the group structure of charities where almshouses form only a part of the charitable operations.

The new emphasis for housing investment is on regional policies, regeneration and combating social exclusion, as set out in the consultation paper on RSL funding 'Developing our investment strategy' (Housing Corporation, 1999). However, almshouses may fit other policy objectives set out

in the consultation paper, such as the emphasis on local neighbourhoods and sustainable communities, and the need for the provision of rural housing. Almshouse charities may also find that their lower rent levels, compared to some other RSLs, will strengthen their position when bids for funding are being considered. However, the document makes it clear that The Housing Corporation will expect to see "more effective long-term partnerships which will facilitate the provision of good quality affordable social housing which people want to live in and for which there is demonstrable need" (Housing Corporation, 1999, p 1).

Governance and accountability issues

Earlier in the report, it was suggested that people coming into almshouses in the future may have higher expectations, not just in terms of accommodation standards but also in terms of consultation and involvement. Concerns about governance in the social housing sector have focused on a range of issues, from broad concerns about citizenship rights and access to housing through local community accountability to the detail of tenant/resident involvement (Marsh and Mullins, 1997; Malpass, 1997). It is accepted that other social landlords have not always succeeded in addressing accountability and resident participation issues (see, for example, Riseborough, 1997 on difficulties in tenant involvement in older people's housing).

Almshouse charities will need to address both resident involvement and the range and experience of their trustees if they are to satisfy potential partners (such as local authorities) and meet the expectations of potential residents in the 21st century. The first almshouse charity has now appointed a resident as a trustee, and this has had the agreement of the Charity Commission, who have agreed that as long as residents do not exceed one third of the total trustees then this is acceptable.

Conflicts of interest: conservation at all costs?

One problem which appears almost impossible to resolve to everyone's satisfaction is the conflict between the demands of conservationists (and the costs which accompany these demands) and the need for adequate, value-for-money housing.

The authors are not unsympathetic to the need for conservation expressed by English Heritage and local authority conservation officers, and neither are the trustees, clerks, architects and housing association staff interviewed during the research. For everyone who shares a fascination with almshouses, their historical interest is often centred on the buildings themselves, and their importance in the village, street or town centre scene. Yet surely there is a problem if the demands of the conservation lobby, and, too often, their unwillingness to fund the extra costs of their demands, prevents re-use of the building? As an earlier quote from a trustee said:

“Lady Flo [the 17th-century founder] didn’t leave the house to the parish to be a wonderful historic this or that. She left it to house the poor. Like anyone with a hobby horse, conservationists become incapable of compromising to make something work.”

There is a need for more discussion and compromise, and the shared will from all parties involved to try to ‘make something work’, enabling the reinterpretation of the original benefactor’s aims as discussed earlier in this chapter.

The alternative is to lose the almshouses as historic buildings, either through disrepair and eventual demolition, or through sale for owner-occupation or other uses. In such cases, the original historic buildings are no longer available to ‘house the poor’ as their benefactors intended.

The intention and spirit may live on in new buildings in a different location. Sometimes, this will be the only possible solution. The question here, as expressed by one trustee, is whether it is better if possible to allow people the privilege of continuing to live in the old buildings, or whether it is better to build, for example, new bungalows or an extra-care Scheme elsewhere. One of the Corsham trustees was clear that if possible, local residents who need housing should continue to be able to live in the historic buildings. A resident at Whetstone’s Almshouses, Ilton echoed this, saying that she felt privileged to live in the almshouses, despite certain inconveniences.

There is no easy answer, and the examples in Chapters 6 and 7 showed both options. But it is a question for both The Housing Corporation and local authorities, when asked to fund almshouse

developments. It is also a question for housing associations when deciding whether to work with almshouse charities, which should be asked at the start of *any* almshouse project.

The features of successful almshouse charities

It is clear from the fieldwork carried out for this research project that there are certain key ingredients which are common to successful and forward-looking almshouse charities. The examples in Chapters 6 and 7 show the need to be flexible, to move with the times, to reinterpret the original aims, and to be constantly open to new opportunities, working in partnership with other organisations.

Examples have included:

- developing new housing-with-care schemes;
- developing outreach work in the wider community, such as day centres;
- selling unsuitable almshouses and moving to provide new almshouses in other locations;
- using almshouses to house people with different needs, rather than older people.

The importance of partnership and networking

Networking, and the role of key individuals, proved to be most important in bringing projects to a successful completion.

Although partnership and networking was important in every almshouse studied, the Bristol St Nicholas with Burton Almshouses is perhaps the most notable example. At first sight, the three partners who cooperated on this project may appear unlikely bedfellows, with little in common. The Society of Merchant Venturers is over 440 years old and was incorporated by Royal Charter in 1552. Members of the Society play an important part in the life of the city, and are involved in a wide range of charitable activities, not just almshouses. The Society describes itself as:

“... comparable to a London livery company ... an organisation of Bristol business people who, independently of

industrial or commercial bias, seek to encourage and sustain old-established and new charitable organisations whose activities benefit today's citizens of Bristol and future generations."

Solon South West Housing Association is a locally based association managing good quality homes and working with people in greatest housing need, primarily in the inner city. In the past, it had a radical, 'left-wing' image and was originally set up in the 1970s with a collective management structure. Priority Youth Housing Association was founded in the 1980s and works exclusively with young people; its (mostly young) staff have a professional background in youth and community work.

Partnership between such disparate partners would have been unthinkable 10 years earlier. However, many of the traditional barriers were already breaking down, following a range of innovative public/private/voluntary sector links developed in Bristol over recent years. The Bristol Chamber of Commerce and Initiative has established liaison groups seeking solutions to street homelessness, while Business in the Community has organised visits for business people to voluntary sector projects for homeless people. Common Purpose encourages networking through its study programme: Solon's director had taken part and through it met the Society of Merchant Venturers' solicitor, who was helpful in sorting out a number of legal problems.

The role of the trustees

The role of almshouse trustees is crucial in moving almshouse charities forward into new areas of work and developing good practice in their existing housing.

Chapters 6 and 7 include almshouse charities which are using their investments to develop new services, and willing to re-examine their role and work in partnership to reinterpret the need for their almshouses into the future.

These almshouse charities display the characteristics of any successful organisation, whether in the voluntary, public or private sector:

- they keep their aims and objectives constantly under review;

- they reinterpret their role in contemporary society;
- they are not frozen in time, but are willing to respond to new initiatives;
- they are calculated risk-takers, not cautious custodians.

As discussed in Chapter 4, the role of clerk to the trustees can be crucial, and there may be a need for almshouse charities to seek outside help with those aspects of the role which are not the main professional area of the clerk or other senior staff. This may be achieved by working with appropriate housing associations or consultants.

As recommended by the Almshouse Association (1998), there is a need to ensure that people with relevant experience and energy are recruited as trustees. There are a number of ways of recruiting new trustees. The National Housing Federation researched the process of recruitment to housing association boards (NFH, 1997). It found that too often, board members were recruited through personal contact and word of mouth. It recommended a more open recruitment system, including advertising through networks and journals. Many housing associations now conduct a 'skills audit' of their board members and seek to recruit new board members to fill any gaps identified.

Some almshouses already use this approach, and have made a conscious effort to recruit new trustees. Among those contacted for this research, one recruited a doctor and a nurse when they started expanding into extra-care housing. Another was encouraged to bring in more professional expertise by The Housing Corporation, and recruited a policeman, a retired housing director, and a chartered surveyor. Such an approach can help broaden the experience of almshouse trustees. For almshouse charities where the local authority nominates some of the trustees, the local authority can play a key role in ensuring that the people they nominate will broaden the expertise of the group of trustees.

Partnerships with housing associations: issues for almshouse charities

What role can mainstream housing associations play in helping almshouses in the future? Perhaps the almshouses studied for this research may act as models for other almshouse charities and housing associations. Each is unique, and they show what can be achieved with both trust and imagination.

Alongside these positive outcomes, there was a more negative undercurrent: the lack of trust and suspicion with which some almshouse charities viewed the prospect of partnership with housing associations. There was often a fear of losing their identity and being 'taken over' by a housing association. Yet a development or management agreement can specify clearly the rights and obligations of both parties. In Corsham, the trustees wanted to maintain local control, with a veto on allocations, but acknowledged the need for professional housing management by their local housing association. At Cheltenham, trustees still visit the almshouse residents but housing management is carried out by Sovereign Housing Association.

The examples in Chapters 6 and 7 show the scope for fruitful partnerships between almshouse charities and housing associations, especially in finding alternative uses for almshouses, complex redevelopments, or moves into new areas such as extra-care housing for older people. The trustees quoted earlier who feared that "Young unemployed people or people with disabilities would be too much for them" have an easy answer: as with the Society of Merchant Venturers in Bristol, they can work in partnership with a specialist housing association, experienced in working with such client groups. Similarly, the trustees involved in the complex St Ambrose redevelopment in Bristol felt that they needed the expertise of Brunelcare, a specialist housing association for the development process.

These are not 'takeovers': they facilitate the trustees' reinterpretation of their role, and help them to move forward into the next century.

However, for that to happen, there needs to be an opening up of links between almshouse staff and

trustees, and housing association staff and board members. This reflects the situation not so many years ago when local authority staff and councillors were suspicious of housing associations. Such attitudes have been broken down a good deal, not least by the creation of various formal and informal networks and forums. As observed before, almshouse charities do not generally play a role in such networks; to do so is one way forward.

A final point on liaison with housing associations is the advantage of being able to access loan finance more easily. This can be difficult or impossible for a small, poorly endowed almshouse charity but may become possible by working with a partner housing association. This can be either through the housing association acting as corporate trustees (eg, Hanover and the Flood Charities), or with a lease arrangement (eg, Sovereign, Knightstone).

Partnership with almshouse charities: solutions for housing associations

There are a number of problems which can arise for housing associations working in partnership with almshouse charities, as explored in previous chapters. On the development side, the complexity of almshouse funding and (sometimes) the inexperience of trustees can compound delays.

Housing associations have to consider whether they will be able to deliver on time, given the strict Corporation requirements on grant take-up.

Cost over-runs are another potential problem, and refurbishment works are particularly prone to this. Yet it is possible to find ways round this problem. There are enormous advantages in carrying out a detailed survey and feasibility study (as in the almshouse renovation at Whetstone's Almshouses, Ilton).

There have also been legal problems over agreeing leases; one housing association understood that the almshouse charity with whom they were working was unable to grant a lease, although other research examples have succeeded in achieving this. Such legal hiccups upset the development process and can lead to delays.

Finally, it would be advisable to check at the outset whether the almshouse charity has consulted with the local authority on housing need in the area.

On the housing management side, working successfully with an almshouse charity will depend on a number of factors:

- a clear agreement as to respective responsibilities, set out in a management agreement, if appropriate;
- flexible allocations criteria (perhaps achieved by broadening the Scheme with the agreement of the Charity Commission);
- clear procedures, and sensitivity on both sides, if the trustees wish to retain a veto on prospective residents;
- cooperation with the local authority over nominations, transfers, mutual exchanges and finding alternative accommodation if necessary during building works;
- upgrading property to as high a standard as possible, given the constraints of the building;
- making sure that lettings are appropriate for the property location and condition (such as people with transport for isolated rural almshouses);
- working with specialist associations if necessary for the client group (as in Chapter 5, where the managing association specialises in young people);
- giving the maximum rights possible in the spirit of full tenancy rights, even if legally the residents only occupy under licence.

Where housing associations are looking to develop new initiatives, they should consider whether there are any almshouses which could play a part (as did the director of Solon South West Housing Association in working with the Society of Merchant Venturers in Bristol).

Working with almshouse charities: issues for local authorities

In many of the almshouses studied, local authorities played a key role in bringing almshouses back into use: by grant finance, by prioritising the development for Housing Corporation funding, or by facilitating links between housing associations and almshouse charities.

Local authorities have a strategic role in the planning of housing provision in their areas. There is increasing interest in making better use of existing housing stock and in strategic planning between local authorities and housing associations over such issues as hard-to-let dwellings, older people's housing and supported housing for people in need of care and support. Almshouses may also have a role to play when local authorities consider their housing and social care strategies: for example, whether there is a need for more extra-care housing, or whether a change of use is desirable; and also considerations about the location of new developments.

As a result of the research on which this report is based, Bristol is planning a review of almshouse provision to develop a strategy for the future; other authorities with a number of almshouses in their area could reap benefits from such joint strategic planning and partnership.

Local authority finance can also be important in bringing almshouses back into use, through improvement grants, SHG and occasionally from other sources of funding, as in the Cheltenham and Corsham examples. Cheltenham Borough Council also advised the Bucklehaven trustees to work with a housing association partner, and to find the right partner by holding a competition between a number of associations.

A number of the almshouses were empty before their refurbishment. Many local authorities now have empty property strategies; their empty property staff need to be aware of the existence of almshouses. Housing staff can work with housing associations and their colleagues in planning departments to bring almshouses back into the social housing stock.

At Leigh Delamere, for example, the local authority housing department knew that the almshouses were empty. When CHS, the housing association, received an allocation of funding for a 'short-life' improvement in North Wiltshire and talked to the local authority about how best to use it, it was the local authority that suggested refurbishing the almshouses for letting to younger people. The local authority housing development manager also liaised with colleagues in the environmental health department to facilitate the allocation of improvement grant to add to The Housing

Corporation funding.

In many cases, almshouse charities have places reserved among their trustees for local authority nominees: in Gloucester, of the 18 trustees on the progressive Gloucester Charities Trust, seven are appointed by the City Council. It is recommended that all local authorities with such rights to appoint trustees should use such nominees creatively to revitalise almshouse trusts and bring them into contact with housing, social care and other relevant professionals.

Another important role for local authorities is in planning and conservation. Almshouse developments are often complex, and need all the help they can get. There are examples in the case studies where planning and conservation officers were singled out for praise in helping steer almshouse development projects through, being helpful over such matters as density and parking requirements (often working closely with the housing department). Yet in other cases, almshouse trustees, architects and housing association development staff felt that they were obstructed rather than helped.

Finally, as discussed in Chapter 4, there is only limited liaison between almshouse charities and local authority housing departments over nominations and other housing management issues. A number of clerks to the trustees said that they approached the local authority but rarely received nominations. Almshouse charities were generally outside liaison groups and forums set up to promote new initiatives such as common housing registers (where one application form is used by a local authority and a group of housing associations in the same city, town or district).

Closer liaison and participation in such forums could help to overcome the lack of nominations, or encourage discussion of alternative uses if the reason for almshouses being 'hard-to-let' is because of their design or location. It could also ensure that any new or refurbished almshouse developments meet local housing needs. If refurbishment necessitates 'decanting' (moving residents out temporarily while building works take place), liaison with the local housing department could be useful, as it could be where residents need permanent exchanges or

transfers to more suitable housing. However, local authorities may require a more transparent allocation process by almshouse charities, and a commitment to good practice over residents' rights, as discussed previously.

The role of the Almshouse Association

The Almshouse Association has played a very important role in encouraging trustees to upgrade their almshouses, and in 'trouble-shooting' where trustees were in difficulty by, for example, helping new trustees to take over. Both staff and executive committee members were interviewed for the research on which this report is based. They share a depth of knowledge of the almshouse movement, and great commitment to the future role of almshouses into the next millennium.

Compared with the lack of material available when the main author carried out previous research in 1982, there is now a great deal of written guidance available to trustees, produced by various Almshouse Association working parties over recent years. Examples include *Standards of almshouse management* (1998) and *The care of elderly frail people in almshouses* (1997). The Almshouse Association is now involved in various initiatives such as warden training in partnership with the Centre for Sheltered Housing Studies in Worcestershire, and is promoting the independent housing ombudsman scheme to its member charities.

The Almshouse Association has a vital role to play in the future, in helping almshouse charities to fulfil their potential and reinterpret their role. It is in a particularly strong position to continue to disseminate best practice and innovative solutions.

The role of The Housing Corporation

Much new and refurbished almshouse accommodation has been provided by access to funding from The Housing Corporation. Many millions of pounds of public money has been spent on upgrading and improving existing almshouses, and building new ones. Although some almshouses

that have received funding now wish to sever their links, there are still almshouses applying for funding.

There is a case for sensible investment of Corporation grant into almshouse developments, providing that they meet certain criteria, including:

- local authority agreement that they meet a priority need (through change of client group if necessary);
- adequate space standards and facilities (for refurbishment);
- adequate funding from other sources for works connected to listed buildings;
- investment of almshouse charity funding and/or free land in the case of new-build;
- use of housing association as development agent (unless the almshouse charity itself has sufficient experience);
- proper liaison over nominations with the local authority;
- adequate housing management arrangements and adherence to accepted good practice (perhaps in partnership with a housing association, depending on client group and charity expertise).

The Almshouse Association and The Housing Corporation have worked closely on the revision of *Standards of almshouse management*. It has now been accepted that almshouse charities managing less than 250 dwellings will be ‘deemed to have complied with performance standards’ if they adhere to *Standards of almshouse management*. The new residents’ handbook takes the place of the previous Almshouse Residents’ Charter and Guarantee.

The Housing Corporation is now very keen to achieve the maximum number of units for the minimum investment of grant. Almshouse charities have the advantage of existing buildings and (sometimes) land or investments to help ‘stretch’ Corporation grant. For example the St Ambrose scheme in Bristol has had only 25% grant from The Housing Corporation. Almshouse charities often own valuable or desirable sites, not normally accessible for social housing, such as in village centre locations. However, their developments are usually complex, because of the conservation and legal positions.

There is a need for discussion between the Corporation and English Heritage, and perhaps the Lottery Heritage Fund, to find a solution to the problem of who should provide funding for historic building works. It is inappropriate that scarce public funding for social rented housing should be spent on preserving ancient buildings.

The role of the Charity Commission

The role of the Charity Commission is crucial, both in regulating almshouse charities and in assisting trustees to reinterpret their role. A detailed discussion of the role of the Commission is outside the scope of this report. This section will therefore concentrate on their role in facilitating new initiatives, and on issues concerning housing development and management.

It should also be noted that for those almshouse charities currently registered with The Housing Corporation who deregister, future control will be exercised only by the Charity Commission.

As discussed in Chapter 5, the doctrine of ‘*cy-près*’ (ie, the principle that no change be made to the purpose or benefit for which the trust was set up) is central. During the research for this report, there were mixed reports of the relationship between almshouse charities and the Charity Commission, when trustees were seeking to explore new initiatives.

Certain examples show the scope for broadening the objectives of the original charity, with the agreement of the Commission, reinterpreting restrictive criteria and opening up almshouses to new client groups. Some almshouse charities encountered problems over leasing or selling almshouses to housing associations, and a clear policy and guidelines on this could be helpful, to both almshouse charities and housing associations.

Some of the people interviewed also felt that the Charity Commission should play a more active monitoring role. Suggestions included checking whether charities are making best use of their resources in promoting new areas of work, rather than sitting on reserves. Others were surprised that

previous trustees had been able to get away without submitting returns and accounts.

Into the next millennium?

Almshouses are a robust social institution which have survived and changed over their first thousand years. They have reflected the spirit of their time. Although, as with any institution, they have their strengths and weaknesses, and face both opportunities and threats, there is scope for them to continue to play a role in housing and social welfare provision in the next millennium. But, in the spirit of our age, they will need to work in partnership with others and be prepared to reinterpret their role in the light of changing demands and expectations. If they fail to do so, the danger is that they will be consigned to the backwaters and be unable to make the contribution of which they are capable.

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Appendix:

Research methodology and organisations contacted

The research project set out to discover innovative uses of almshouses, focusing particularly on The Housing Corporation South West region, because the funding for the research came from The Housing Corporation regional office. The researchers already knew of a number of examples from their own work with housing associations, local authorities and almshouse charities in the region.

In the South West region as of December 1996, there were over a hundred almshouse charities also registered as social landlords with The Housing Corporation, out of a total of 237 almshouse charities which were members of the Almshouse Association. The South West region includes Cornwall, Devon, Dorset, Somerset, Wiltshire, Gloucestershire and the former county of Avon. In the region, there were 97 local almshouse charities registered with The Housing Corporation, and four groups of almshouses in these counties which belong to two national almshouse charities (Licensed Victuallers and Haberdashers).

The following contacts were made to obtain information about other innovative almshouse developments:

- a request for ideas from the Almshouse Association (who supplied a helpful list of innovative almshouse projects and a wealth of other information);
- a request for information from housing association members of the South West Region Development Group of the National Housing Federation;
- an article in *Outlook West*, magazine of the South

West branch of the National Housing Federation, sent to all housing associations and local authorities in the region;

- letters to selected housing associations in the region working with almshouses.

These sources produced a list of about 30 almshouse projects, mainly in the South West. Most of the almshouse charities and housing associations were then contacted to obtain further details in writing or by telephone interview. In most cases organisations and individuals were also visited. Interviews took place with a selection of almshouse trustees and clerks, almshouse residents, architects, and housing association directors, development and management staff (although not all these people were interviewed in connection with every almshouse project). Interviews of staff were semi-structured, using a checklist of topics to cover. Resident interviews were informal. Researchers also spoke to a number of local authority contacts in planning and housing departments.

Interviews were held with the director and assistant director of the Almshouse Association, and two members of the Almshouse Association Executive Committee. The Almshouse Association and The Housing Corporation kindly supplied copies of guidance documents.

Historical detail is drawn from two unpublished reports on Lady Florence Stalling's Almshouses, Yatton and Penrose Almshouses, Barnstaple; we are grateful to Keystone Historical Buildings Consultants and to David Savage for these sources. Further historical information comes from the book commissioned by the Almshouse Association, Brian

Howson's *Houses of noble poverty: A history of the English almshouse*, published in 1993. Information on funding and registration came from both the Almshouse Association and The Housing Corporation.

Almshouse charities and housing associations contacted during the research fieldwork

[Notes

1. Where almshouse charities manage a number of almshouses, the almshouse specifically referred to in the report is marked with an asterisk. There are also a number of almshouses which receive a brief mention in the text but which are not listed here; this is because some information was obtained direct from the Almshouse Association, from talking to housing associations, or from Brian Howson's book, rather than by contacting the charities directly.
2. Almshouse charities which were RSLs at the time of the research are indicated by RSL after their name.
3. We have also listed under the generic heading 'housing association' other bodies (who may not be registered with The Housing Corporation) but who are working in partnership with registered social landlords on these almshouse projects.]

Bristol

Almshouse charities

Bristol Municipal Charities/Orchard Homes [RSL]

*Ben Gough House

John Barstaple House

Foster's Almshouses

Perrett House

Bristol (St John and St Ambrose) Charity

Hill's Almshouses [RSL]

St James' House (Whitson Street Almshouse Charity) [RSL]

Society of Merchant Venturers [RSL]

Colston's Almshouses

Merchants' Almshouses

*St Nicholas and Burton's Almshouse Charity

Housing associations

Brunelcare Housing Association

Carr Gomm Society

Priority Youth Housing Association

Solon South West Housing Association

Cornwall

Almshouse charity

Evelyn Boscawen Trust, Tresillian, near Truro

Devon

Almshouse charities

Barnstaple Municipal Charities

Penrose Almshouses

Exeter Municipal Charities [RSL]

Atwill Kingdon Almshouses

Atwill Palmer Almshouses

Grendon Almshouses

Hursts (Culverland) Almshouses

Hursts (Fairpark) Almshouses

Hursts Trumps Almshouses

Livery Dole Almshouses

Magdalen Almshouses

North Park Almshouses

Exeter Municipal Charities (Church List)

Flaye's Almshouses

Lethbridge's and Davye's Almshouses

Exeter Free Cottages Trust

Heles Charity, Plymouth [RSL]

Lanyon Homes, Plymouth [RSL]

Lord Mamhead Homes

Municipal Charities of Plymouth [RSL]

John Gayer Homes

Rawlins Homes

St Petrock and Heavitree Parish Lands Charity,

Exeter

Ducke's and St Loye's Almshouses

Magdalen Road Almshouses

St Petrock's Close

St Annes & St Francis Almshouses

Housing association

Tamar Housing Association

Gloucestershire

Almshouse charities

Gloucester Charities Trust [RSL]

Buckle Haven Almshouses, Charlton Kings,
Cheltenham [RSL]

Housing association

Sovereign Housing Association

Somerset

Almshouse charities

Lady Florence Stalling's Charity, Yatton, near Weston
super Mare

Whetstone's Almshouses, Ilton, near Ilminster

Housing association

Knightstone Housing Association

Wiltshire

Almshouse charities

Lady Margaret Hungerford Almshouses, Corsham

Leigh Delamere Almshouse Charity

Salisbury City Charities [RSL]

Shrewton Flood Charities

Housing associations

Hanover Housing Association

North Wiltshire Housing Association

Co-operative Homes Services, Reading

Other organisations contacted during the research fieldwork (in alphabetical order)

Almshouse Association

Bristol City Council

Burroughs and Hanham, Architects

Cheltenham Borough Council

Dartington Housing Association

Exeter City Council

Housing Corporation Headquarters

Housing Corporation South West Region

Independent Housing Ombudsman Scheme

Kennet District Council

North Wiltshire District Council

Plymouth City Council

Somerset Rent Officer Service

Stone and Partners, Architects, Taunton

Trewin Design, Holsworthy, Devon