

**THE BUCHANAN TRUST (“the Charity”) &  
THE BUCHANAN TRUSTEE COMPANY LTD (“the Trustee”).**

**THE BUSINESS PLAN – INDEX**

|  | <b>Page</b> |
|--|-------------|
| <b>1. Executive Summary</b>  | <b>2.</b>   |
| <b>2. Background History</b>   | <b>3.</b>   |
| <b>3. Finance Summary</b>  | <b>3.</b>   |
| <b>4. The Starting Point</b>   | <b>4.</b>   |
| <b>5. The Vision</b>   | <b>4.</b>   |
| <b>6. Composition of the Bosbury Estate</b>                          | <b>5.</b>   |
| <b>7. The Proposed 30 Almshouses for ex-military veterans</b>        | <b>5.</b>   |
| <b>8. The Overall Farm Management of the Estate</b>                  | <b>6.</b>   |
| <b>9. Letting the Almshouses on Licences not Tenancies</b>           | <b>7.</b>   |
| <b>10. Veterans’ Recuperation, Occupation and recovery</b>           | <b>8.</b>   |
| <b>11. Beneficiaries Moving On</b>                                   | <b>8.</b>   |
| <b>12. Employment and Training Links with Colleges and Employers</b> | <b>9.</b>   |
| <b>13. A Farm-Based Recovery Centre for the Beneficiaries</b>        | <b>9.</b>   |
| <b>14. The First 12 Months’ Achievements</b>                         | <b>10.</b>  |

# THE BUCHANAN TRUST (“the Charity”) & THE BUCHANAN TRUSTEE COMPANY LTD (“the Trustee”).

**Executive Summary of the Bosbury Estate Business Plan** – in more detail page 3 onwards

## 1. History

The Buchanan Trust was founded by indenture in 1918 for homeless war veterans by Robert Buchanan, a local benefactor, who left the freehold of the entire 700 acre “Bosbury Estate” (nr. Ledbury Herefordshire) in trust to the **Nation**, in memory of his son Alan who fell in World War 1. His intention was to use the land and buildings to provide employment and housing for poor returning U.K. servicemen without homes and employment once they left the armed forces.

## 2. Background

From 1998 – 2016 the estate was managed by Herefordshire Council who leased the farms through their smallholdings section of the Property Department. There are 6 c.100 acre farms, of which by 2016, only two were leased to tenants with ex-military backgrounds.

## 3. The Charity Commission

Following complaints about the limited availability of farms for ex-military applicants, the Charity Commission became involved and, after investigation, proposed a “Cy-près” revision of the charity’s “objects” to reflect the social changes that had taken place over the century since 1918. Following Herefordshire’s agreement to the new constitution, the Commission asked the Council to hand over the control of the Charity to “independent” trustees who were appointed following interviews by a representative panel chosen by Herefordshire.

## 4. The New Independent Trustees

The new trustees, who manage the unincorporated trust through a limited company (above), took over on 26 May 2016, and immediately began formulating a business plan that took into account the Charity Commission’s advice that the estate should provide accommodation, employment, training and support for a much greater number of ex-military beneficiaries than the two being helped.

## 5. The Starting Point

The farms were occupied by 2 ex-military beneficiaries, and 4 commercial tenants, one of whom had a lifetime tenancy, the other 3 being let on “Farm Business Tenancies” all of whom had been given verbal warning of the likely changes. The new trustees served 3 formal notices to quit.

## 6. “The Vision” – 30 Almshouses, A “Recovery Farm” and a “Working Farm”

Over a 6 year period, as existing leases expire and are not renewed, the trustees are aiming for a self sufficient estate, with the 700 acres (eventually) and associated buildings, being managed in-hand as a single unit, forming a small community of veterans who can help support each other.

Using the 3 vacated commercial farms, a 300 acre in-hand “Working Farm” has been set up with a farm manager plus assistant and stock and equipment purchased. A 30 acre “Recovery Farm” is also planned with on-site support for the 30 beneficiaries to aid their personal recovery plans.

30 ex-military beneficiaries will be appointed, comprising mainly single, homeless, ex-service personnel who wish to make a successful return to civilian life but have not yet done so, or decided how to achieve it. They will live in almshouses created from the farmhouses and other buildings either through re-modelling or new build. Their licence payments will come from Housing Benefit.

The Trust has registered with the Almshouse Association & its Consortium Ltd. and has approached the Homes and Communities Agency (HCA) to become a registered Housing Association as this provides access to request funding to help with the cost of building the 30 almshouses.

## 7. The Finances

In broad terms, the almshouses will cost c.£100,000 each i.e. c.£3 Million. Modernising the “Working Farm” and creating the “Recovery Farm” will cost c. £1 Million. The Employment Training Centre, Workshop “starter units” and refurbishing the derelict cottage as an Art Studio need a further £1,115,000, taking the total needed to £5,115,000. The Trust can contribute the sites from its reserves which will be almost exhausted by the first phase of works; the Trust hopes the HCA will offer some funding. That leaves a substantial sum to raise from a national appeal to create affordable, supported, short term, subsidised housing for 30 recovering veterans.

## **WORKING DRAFT BUSINESS PLAN TO RE - MODEL THE BUCHANAN TRUST ESTATE**

(As near as possible to the "spirit" of the Founder's 1918 gift in a 21<sup>st</sup> Century context)

### **THE INITIAL BASIS FOR RESTRUCTURING THE MANAGEMENT OF THE BOSBURY ESTATE FOLLOWING THE CY-PRÈS CHANGES MADE BY THE CHARITY COMMISSION IN 2016**

#### **2. BACKGROUND**

- 1) The Buchanan Trust was founded by indenture in 1918 for homeless war heroes by Robert Buchanan, a local benefactor who left the entire 700 acre estate in trust, in memory of his son Alan who fell in World War 1. His intention was to provide employment and housing for returning war heroes without homes and employment.
- 2) With no new grants to ex-military applicants of farming tenure since 1998, and only two ex-military tenants in situ, the Charity Commission advised the appointment of a new independent trustee, the Buchanan Trustee Company, which occurred on 26th May 2016.
- 3) With hindsight it is clear that the possibility of taking on an entire farm business was way beyond the expectations, resources and experience of all but the most exceptional ex-service applicants. The requirement for access to £100,000 capital to stock and equip the farm clearly excluded those in greatest charitable need, and effectively thwarted the objects of the Trust to help needy ex-military personnel, by putting them off.
- 4) Farm units of about 100 acres per single beneficiary are barely economic and re-modelling the estate can also provide help for a much greater number of beneficiaries.
- 5) The Buchanan Trustee Company has been advised by the Commission, by land agents and military and civilian welfare officers and have reached the following broad conclusions about the future:-
  - Any restructuring of the way the estate is let in future, should be designed to meet the charity's objectives with the best possible outcome for larger numbers of ex-military beneficiaries, whilst using all the land and buildings to the best advantage to this end, and at least balancing the books or turning a small profit from the farming activities.
  - The new trustee believes that the Charity's objectives are best achieved by managing the estate as a single farm, and re-modelling the buildings to create up to 30 "veterans' almshouses", with access to most of the estate for respite, recuperation and training. The stays would be short term with a view to a successful transition to civilian life. The 700 acres (eventually) and the associated buildings, will form a small community of veterans who can help support each other

#### **3. FINANCES**

- 1) The development of the estate could ultimately produce say 30 military beneficiary licensees' almshouse flats, potentially claiming housing benefit to pay for their accommodation. There would be no right to buy ensuring that the facility remained for years to come, and preserving the permanent endowment.
- 2) The Trust does have some funds available, most of which can be invested in the substantial works required to convert farm houses, cottages and redundant agricultural buildings into 30 flats and cottages. However, if these plans are to be undertaken in the desired timeframe, and so as to start assisting more beneficiaries more quickly, external funding is being sought from the HCA and other fund raising opportunities are also being investigated.
- 3) Considerable investment is also needed to staff, stock and equip the "in-hand farm" and for the "recovery farm" for the veterans.

#### 4. THE STARTING POINT

- a) The charity owns 700 acres which comprised 6 relatively “old fashioned” c. 100 acre farms, all originally let to single tenants, of which only two had ex-military backgrounds.
- b) The Charity Commission stipulated in October 2014 that farm property leases should not be renewed unless they gave their prior specific approval. Accordingly the three “commercial” non ex-military farm tenants were given 12 months’ notice and have left. The “lifetime” non ex-military commercial tenant farmer has said he will probably retire by 2021/2.
- c) Letting the estate as whole farm units meant that the land and buildings were tied up in the hands of a small number of tenants for long periods, giving little opportunity for new ex-military applicants.
- d) This is not what was intended by the founder who left the estate primarily for the benefit of ex-service personnel who justified the provision of “relief in need” i.e. poor and homeless.
- e) The Trust has not kept pace with the commercial changes in agriculture in relation to the management of this estate; viable commercial conventional agricultural units are much larger these days.

#### 5. “THE VISION”

The vision, which is to be achieved incrementally, over a 6 year period, as existing leases expire and are not renewed, is to aim for a self sufficient estate with:-

- the 700 acres (eventually) and associated buildings, being managed in-hand as a single unit, forming a small community of veterans who can help support each other;
- 30 beneficiaries, who it is currently anticipated will be mainly single, homeless, ex-service personnel who wish to make a successful return to civilian life but have not yet done so or decided how to achieve it. The size of accommodation units will depend upon demand and some of the units would be for people in wheelchairs and/or with serious disabilities, all housed in self contained flats - these to be created by re-modelling the farmhouses, cottages (save those needed for any staff) and redundant agricultural buildings and let to them on Almshouse licences, with maintenance payments attracting Housing Benefit, for periods of 6 to 18 months before returning to normal civilian life;
- for the beneficiaries’ occupation and training, the provision of a “working farm-based recovery unit”, possibly provided in partnership with another charity with a track record of providing rehabilitative support staff, managing and reviewing the “individually centred support plans” for the beneficiaries;
- this would be a “low tech” care farm and yard, comprising up to 50 acres at the core of the estate, providing recuperation, respite, work experience and leisure time activities for the beneficiaries, who can also access some of the other commercial acreage, on a supervised basis, for more extensive training and work experience;
- training, qualifications and work experience links would also be developed with nearby agricultural colleges e.g. Harper-Adams, Hartpury and Holme Lacy Colleges and also with local employers, many of whom are already “military friendly” given the strong army presence in the County. There will also be “on-estate” training courses to enable beneficiaries to gain qualifications/certification in both the rural and construction sectors, with flexibility over training types and time length in order to fit in with those in recovery.

**6. AFTER THREE FARMS WERE RECOVERED FROM PRIVATE TENANTS, THE ESTATE COMPRISES AS FOLLOWS:-**

|                    |                      |                |
|--------------------|----------------------|----------------|
| <b>Total</b>       | <b>331.09 acres</b>  | <b>In Hand</b> |
| <b>Total</b>       | <b>362.45 acres</b>  | <b>Let</b>     |
| <b>GRAND TOTAL</b> | <b><u>693.54</u></b> |                |

**7. THE 30 ALMSHOUSES – A BRIEF DRAFT DEVELOPMENT PLAN – 2017 to 2022**

- a) **The strategic plan is to create the first 5 almshouses** by March 2018. Phase 2 in 2018/2019 will probably be another five if HCA funding and outside capital can be secured. Phases 3, 4 & 5 will follow over the next three years, when Trust funds allow, and assuming HCA funding does continue until 2021.
- b) The trustees “inherited” from Herefordshire “restricted” funds and “unrestricted” funds. The former comprised the proceeds of former land and buildings sales between 1998 and 2016 which can be spent only on new “replacement” buildings and “major refurbishment of existing buildings” eg in order to provide almshouse accommodation for the ex-military beneficiaries. The latter is “accumulated income” which can be spent generally on outgoings. A prudent level of reserves will be retained for unforeseen events.
- c) The Trust is in the process of registering with the Homes and Communities Agency (“the Social Housing Regulator”) to become a “Registered Provider” or Housing Association. This allows the Trust to bid for grants from the HCA towards the cost of creating the planned almshouses. The HCA has been supportive of the plans and has accepted a preliminary application to register.
- d) One cottage has planning consent for two almshouses; tenders were sought and the work has started. With support from Herefordshire Council, planning applications are being prepared to create an attractive courtyard of 6 almshouses at a further Farm on the estate.
- e) The plan assumes that in broad terms, the almshouses will cost c.£100,000 each i.e. c.£3 Million. Modernising the “Working Farm” and creating the “Recovery Farm” will cost c. £1 Million. The Employment Training Centre, Workshop “starter units” and refurbishing the derelict cottage as an Art Studio, a further c. £1,115,000, taking the total needed to c. £5,115,000. The Trust can contribute the sites and most of the cash from its reserves and hopes the HCA will offer funds. That leaves a substantial element of several million pounds to raise from a national appeal to create affordable, supported, short term, subsidised housing for 30 recovering veterans.

**The Plans to Create The First Almshouses For The Beneficiaries**

The Trust’s Chairman escorted the planning department’s team leader around the estate in March and a number of traditional farm buildings were agreed for possible almshouse re-modelling, subject to planning consent. When these have been secured, applications for the latest round of HCA grants will be made (2016-2021)

The head of planning and relevant members of the Council have also been briefed by the chairman and are generally supportive of the Trust’s aims & objectives, and totally committed to the principles of the Armed Forces Covenant. Based on those discussions, planning applications are being submitted for 13 almshouses, with two already consented.

Most of these 13 will be a mix of single and two bedroom units but some may be three bedroom due to the numbers of children in the family.

## 8. THE OVERALL FARM MANAGEMENT OF THE ESTATE

The trustees have reorganised the management of the estate. This is work in progress and more land will be brought in-hand as it becomes available and will be farmed commercially, in a prudent way.

- a) **The 3 leased farms and two privately let cottages on the estate** - the day to day management of these is undertaken by Knight Frank, the retained managing agents.
- b) **The “in-hand farm” comprising 300 acres**- the trustees have appointed a farm manager, and part-time stock person to manage this on a profit making basis to generate income for the Trust to spend on the beneficiaries’ activities, recuperation, training etc.
- c) **The 26 acres of Woodlands** are managed by the Chairman. The **Cart Shed** charity has been given a licence to occupy part of one wood. Their programme of training to help with the transition from military to civilian life is usually available free of charge to those who have served as a member of the British Armed Forces.
- d) **The “farm-based recovery unit”**, when created for the beneficiaries will have a dedicated specialist Support Manager and possibly a deputy.
- e) **A part time farm/estate secretary** has been appointed to take responsibility for administration matters and this role is likely to evolve.

### **The trustees are also considering other practical options for the future:**

- f) Arable land will probably be farmed using a contractor due to the small acreage available.
- g) To investigate commercial opportunities using the pasture and livestock buildings including the best returns from running an in hand livestock enterprise. These are likely to be based on beef or sheep enterprises; calf rearing and other new opportunities will also form part of the review. A local supportive farmer with a contract with a well known supermarket has provided the trustees with helpful advice about how to secure similar contracts to his own.
- h) To investigate diversified farming enterprises on the estate including egg production
- i) Reviewing the opportunities, both through grant funded schemes and by the activities of beneficiaries in training schemes, to improve the ecology and biodiversity of the estate.
- j) To look in further detail with suitable other charities to assess the practicalities of establishing the “recovery farm” – a low tech. recuperation & respite farm including therapy through working with livestock. There will be 24 hours assistance available on site for the beneficiary “trainees”.
- k) Two farmhouses will probably be used for the in-hand farm manager, and their staff, or as required on livestock welfare grounds to provide 24 hour cover.
- l) Unsuitable buildings, or ones for which planning consent could not be obtained, will be reviewed as to their future suitability, and thereafter a decision made as to whether to maintain them, or replace them with more suitable modern buildings.
- m) The 26 acres of woodland will provide training opportunities for the beneficiaries. It will also bring the woods back from their present neglected state into productive management for firewood, as well as providing good biodiversity.

- n) A lease is in place for the Herefordshire based “Cart Shed” (therapy through woodland craft skills) who have already moved into one area of the woodlands on a peppercorn rent.
- o) It would be possible to utilise existing buildings for stabling and to create an indoor riding school as part of a new equestrian unit, possibly in partnership with an equine therapy charity. A gymnasium/meeting/training rooms for veterans may also be needed. These projects will be investigated and thoroughly costed so an analysis can be made as to the likely return on investment, not only financially but also in therapy terms; but outside funding will be necessary.
- p) A derelict cottage can be brought into use as a barn, but if renovated and extended, with planning consent, could provide an arts based training facility/art studio. This would be an expensive development for the future when funds allow, but the site is quite magnificent.
- q) It is difficult to predict an exact timescale for the changes as they depend on lease expiries, retirement of existing tenants, planning consents, funding availability and the success of the venture. However due to the way the estate is presently let, and the wish to behave fairly towards the existing commercial tenants, several phases are necessary.

## **9. LETTING THE PROPOSED ACCOMMODATION FOR THE EX-SERVICE BENEFICIARIES**

- a) The 30 ex-military beneficiaries would be offered “Almshouse” licences subject to weekly maintenance contributions (“WMC”) for which Housing Benefit would be claimed, to occupy the various accommodation formed from the farmhouses, cottages, vacant redundant agricultural buildings and new build.
- b) The letting of the properties will be through a combination of the applicant’s own website and already established links with local, regional and national service charities such as the Royal British Legion, Hereford Veterans Support, Hereford Garrison’s Welfare Officer, Hereford Cart Shed and SSAFA who are all in daily contact with those in need of assistance and housing.
- c) The prospective beneficiaries will be required to demonstrate they are former serving members of the armed forces of the Crown by reference to their discharge book or official service records and number. They will be required to demonstrate they are financially in need by disclosing their income, expenditure and disposable income. They will also be required to demonstrate personally and/or through a sponsor that they are in need of the assistance the charity can provide to enable them to make a successful transition from military to civilian life and that they are likely to be able to fit in with the other people living and working upon the estate. Face to face interviews will be carried out in all cases.
- d) Charitable organisations offering to help the charity’s target group of beneficiaries will be required to demonstrate that their beneficiaries have the same characteristics as the direct beneficiaries on the estate.

## 10. RECUPERATION OCCUPATION & RECOVERY

- a) Ex-military personnel would be offered 6 - 18 months largely unpaid respite, recuperation and training on the care farm, but possibly on a profit share from the care farm "co-operative" to help introduce some private sector business experience to the beneficiaries.
- b) Their accommodation licence maintenance contributions (WMC) would be paid by Housing Benefit. They should also be able to claim individual Employment Seekers' Allowance (ESA) of £73.10 per week.
- c) There would be various forms of low tech farming in the "recovery" farm with about 20 acres to provide a tranquil recovery opportunity, life experience in rural surroundings, and helping on the farm with on-site vocational training, as suited to each individual beneficiary. Some of the beneficiaries might be able to work with supervision on the commercial farm, possibly as apprentices.
- d) In addition to having the opportunity to work on and around the recovery farm, gain skills and enjoy craft sessions the clients would have the opportunity to discover animal or equine therapy if this latter aspect is progressed.
- e) Some beneficiaries may suffer from "institutional neurosis", having been deprived (whether unintentionally or not) of independence and of responsibility, to the point that once they return to "outside life" they are often unable to manage many of its demands, and without help this can see veterans finishing up on the streets or in prison. Many also suffer from Post Traumatic Stress Disorder as a result of the experiences and scars of warfare.
- f) The trustees believe the treatment needed is principally healing time, non-judgemental friendship, companionship, being kept busy, and practical help learning how to look after themselves independently, and developing a sense of worth in a community of those from similar military backgrounds. Animals can play an important in the healing process as they are non-judgemental and actually dependent on the beneficiaries – effectively reversing the process that has often disabled them.
- g) The support offered will be focussed on "let's do this together" rather than "let me do this for you". Every activity in the recovery process will be delivered in a "non-dependency creating" way.

## 11. BENEFICIARIES MOVING ON

- a) Individual progress would be continually monitored by the Support Manager, and after the first three to six months, initial reviews would identify where next, and when. At this point unsuitable beneficiaries might need to be considered for transfer to more appropriate surroundings:-
  - (i) For some, a return to their own home, or home town, may be the preferred option, in which case they would be helped to register with the local housing associations as vulnerable adults with priority opportunities. For some, a second six months may be beneficial.
  - (ii) For others it may be possible to find voluntary work or sheltered "work for heroes" placements in Worcestershire and Herefordshire for, say, six months.
- b) The maximum stay would be 12 – 18 months, subject to review and the trustee's discretion. However, there may be a need for one or two longer term agreements with responsible experienced veterans who would help keep a supervisory eye on the community.



## **12. EMPLOYMENT AND TRAINING LINKS WITH COLLEGES AND EMPLOYERS**

- a) Links would be developed with agricultural colleges e.g. Harper-Adams, Hartpury and Holme Lacy (Hereford and Shropshire) Colleges.
- b) Links would also be developed with local employers many of whom are already "military friendly" given the existing strong army presence in the County.
- c) The Low Tech Farm would diversify, and also provide sheltered employment in a "smallholding style" wherever possible.
- d) A local training firm will come to the estate to provide relevant courses to lead to qualifications where this is more suitable.

## **13. A "FARM-BASED RECOVERY UNIT", FOR THE BENEFICIARIES**

### **AN "OLD FASHIONED" LOW TECH FARMYARD WITH 20 ACRES**

- a) The aim of the farm would be self-sufficiency in food for the community from crops, fruit, vegetables and animals; any surplus to be sold at farmers' markets or on the egg round.
- b) A couple of UTVs ("mules") and a basic tractor would be provided for the farming, but working horses are also being considered.
- c) The in-hand farm, will assist with hay/silage making and annual hedge cutting and other larger/more mechanised tasks
- d) Fruit trees will be planted to rejuvenate existing dilapidated orchards and cider production will be considered. The Higher Tier environmental scheme may be entered with subsidised works such as hedgerow planting/gapping up, pasture restoration to re-create wildflower meadows, ponds will be cleaned out to create better habitat, wild bird covers for Winter seed for songbirds, pollen nectar mixes etc.
- e) A flock of free range laying hens - eggs that are surplus to the needs of the charity could be sold at local farmers' markets, or possibly from the farm directly via a local egg round with an estate branded van to encourage veterans to interface with the public and become used to basic accounting systems and book/record keeping..
- f) Allotments for the beneficiaries to work individually or as a group.
- g) Pig arcs, raising free range traditional breed pigs - two or three sows giving nine litters of piglets per annum to care for and sell.
- h) A small herd of cattle, 10- 20 well handled suckler cows.
- i) Horses and donkeys, mainly for companionship therapy, possibly including a couple of heavy horses for helping beneficiaries recuperate with ploughing and mowing in the old fashioned way.
- j) A modest sized flock of sheep that will be lambed on the farm.
- k) A hay crop providing for the livestock and horses.

- l) The hedges would benefit from the removal of any dead or dying trees. Replanting the hedge gaps with species such as crab apple, hazel and hawthorn. Where appropriate, encouraging hedge laying.
- m) Use the 26 acres of woods, presently in hand, for leisure and training in woodland skills, coppicing etc. The woods will be used for firewood production and possibly biomass to run the heating systems for the residences.
- n) Erect a couple of poly tunnels - produce will be grown to help sustain the resident and visiting veterans;
- o) Other farming enterprises and diversification would be considered as the unit develops.
- p) Conversion of redundant agricultural buildings into horse-riding or leisure facilities and other communal features such as a meeting room or business training centre.
- q) Invest in renewable technology where economically viable e.g. rooftop solar PV panels and biomass heating systems. This would aid self-sufficiency and provide another estate income stream, as well as employment activities for beneficiaries.

#### **14. THE FIRST 12 MONTHS' ACHIEVEMENTS - MAY 2016 TO APRIL 2017**

- In May 2016 the Trustee accepted a smooth transfer from Herefordshire District Council of the entire 700 acre estate including all the assets and liabilities, and the charity's website ([www.buchanan-trust.org.uk](http://www.buchanan-trust.org.uk)) which has been updated.
- At an early stage, the Chairman established, or confirmed, cordial local and national working relationships with:-
  - Herefordshire Council including the Leader of the Council in respect of the Armed Forces Covenant (with thanks to Penny Jones and Tracy Ricketts), and the Planning Department
  - Bosbury Parish Council with whom a public meeting was held at the Parish Hall on 27/04/2017 in respect of community engagement.
  - The Royal British Legion, SSAFA, Hereford Veterans Support and the Cart Shed.
  - Help for Heroes
  - Walking with the Wounded
  - Forces in Mind
  - Veterans Self Build
  - Herefordshire Civilian Military Task Group
  - COBSEO (the Confederation of Service Charities)
- By March 2017 the Trustee had sensitively managed the lease terminations of the three non ex-military tenants from their farms, all of whom had been given prior warning some seven years previously.
- Recruited a resident farm manager and assistant to run the consolidated 300 acres from the three farms whose tenants had left.
- Purchased 36 cattle, 547 sheep plus farm machinery
- Developed phased plans to construct 30 Almshouses for the Military Beneficiaries by "re-modelling" farmhouses, redundant agricultural buildings and new build using traditional materials.

- Made a successful “Preliminary” Application to the Homes and Communities Agency (HCA) to become a Registered Provider of Social Housing including almshouses. (Grants are available from the HCA to assist Registered Providers of social housing with the construction of almshouses by conversion or new build.)
- Received a draft agreement from the Charity Commission to amend the charitable objects to include the provision of social housing in the form of almshouses for the 30 ex-military beneficiaries. This will ensure there is no right to buy or acquire and the almshouses being provided will remain in perpetuity for future beneficiaries as the original 1918 indenture intended.
- Secured a planning consent and started work to turn a farm cottage into 2 almshouse flats for which the Homes and Communities Agency have agreed to “ earmark” two grants to be available when the charity’s detailed application to register has been approved and the buildings completed.
- Made a successful pre-application enquiry for planning consent for a further 11 almshouses. (Detailed applications in process).
- Purchased a mobile home for an existing hard standing caravan site and appointed a homeless ex-military beneficiary to live there short term, who was nominated by Hereford Veterans’ Support.
- Appointed an unemployed ex-military beneficiary to make short term use of an empty building as a workshop for his woodwork interests which he has turned into a business.
- Agreed terms with Herefordshire’s Cart Shed charity who support a considerable number of veterans to create of a second operation in one of the woodlands on the estate. They have already organized their site works and have agreed grant aid to facilitate their first course starting there in July 2017.
- The Board has joined the Almshouse Association and is joining the Almshouse Consortium Ltd. to get consultancy help with the process of registering as a Provider of Social Housing.
- The Board has considered the regulatory framework requirements and the role of the Social Housing Regulator and has resolved that they are able to comply with their regulatory requirements.
- The Board has formally adopted policies and procedures for the estate and the intended Almshouses as required principally by the HCA in respect of:-

*Almshouse Allocations, Good Governance, Health and Safety,  
Home Standards, Rent Standards, Community Relations,  
Trustees’ Code of Conduct, Trustee Skills’ Audit, Conflicts of Interest  
Register of Interests, Complaints Procedure, Equal Opportunities,  
Financial Viability, Financial Controls & the Chairman’s Role.*

AB/04a/27/06/2017