

THE BROADWAY TRUST

England & Wales · Charity number 1166355

Details

Status Registered

Legal form CIO

Registered 2016-04-05

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

Contact

Address 72 High Street
Broadway
Worcestershire
WR12 7AJ

Phone 07973889863

Email secretary@broadwaytrust.org.uk

Website broadwaytrust.org.uk

Activities

Objects: 'THE OBJECTS OF THE TRUST SHALL BE FOR THE BENEFIT OF THE VILLAGE COMMUNITY AND THOSE VISITING BROADWAY, AS FOLLOWS:(A) TO ENCOURAGE HIGH STANDARDS OF ARCHITECTURE AND PLANNING IN OR AFFECTING THE VILLAGE OF BROADWAY AND THE SURROUNDING AREA ("THE AREA OF BENEFIT").(B) TO EDUCATE THE PUBLIC IN THE GEOGRAPHY, HISTORY, NATURAL HISTORY AND ARCHITECTURE OF THE AREA OF BENEFIT.(C) TO ENCOURAGE AND SECURE THE PRESERVATION, PROTECTION, DEVELOPMENT AND IMPROVEMENT OF FEATURES OF GENERAL PUBLIC AMENITY OR OF HISTORIC INTEREST IN THE AREA OF BENEFIT.(D) THE PROVISION, MAINTENANCE AND SUPPORT OF PUBLIC AMENITIES IN THE AREA OF BENEFIT.

Activities: To encourage high standards of architecture and planning in or affecting the village of Broadway and surrounding areasTo educate the public in the geography, history, natural history and architecture of the area of benefitTo encourage and secure the preservation, protection, development and improvement of features of general public amenity or of historic interest in the area of benefit

Classification

- **How:** Provides Buildings/facilities/open Space, Provides Advocacy/advice/information
- **What:** Environment/conservation/heritage
- **Who:** The General Public/mankind

Geography

- Worcestershire

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£6,135	£8,443	-	-
2023-12-31	£7,156	£8,196	-	-
2022-12-31	£3,911	£7,269	-	-
2021-12-31	£15,388	£4,406	-	-
2020-12-31	£7,730	£13,340	-	-

Trustees

Name	Role	Appointed
Christopher Peter Hotten QC	Chair	2019-05-23
James Kirkby Peace		2023-05-12
Lindsay Airey		2026-01-07
Michael Anthony de Navarro QC		2021-07-27
Robert Andrew Fulton Lib		2022-08-02
Thomas Joseph Morris		2023-07-21

THE BROADWAY TRUST

England & Wales - Charity number 1166355

Accounts



Trustees' Annual Report for the period

From **01/01/2024** To **31/12/2024**

Charity name: The Broadway Trust

Charity registration number: 1166355

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<ol style="list-style-type: none"> 1. To encourage high standards of architecture and planning in or affecting the village of Broadway and its surrounding area. 2. To stimulate public interest in the history, architecture and landscape of Broadway 3. To encourage the preservation, protection and improvement of features of historic interest or general public amenity 4. To support and maintain those amenities necessary for a strong community spirit in Broadway
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<ol style="list-style-type: none"> 1. Managing and maintaining lands owned by the Broadway Trust for the benefit of the Broadway community. 2. Expanding and supporting the Membership of the Broadway Trust. 3. Awarding grants to local bodies in accordance with the Constitution of the Broadway Trust. 4. Reviewing and where appropriate commenting upon planning applications within the parish of Broadway.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Yes.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
	Para 1.38	

Policy on grant making		
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<ol style="list-style-type: none"> 1. Awarding grants in the total sum of £1,450; £1,000 to Broadway Museum and Art Gallery to part fund a new introductory film and £450 to the Barn Close GP Surgery Participation Group to part fund its bi-monthly informative articles in the Broadway Magazine. 2. These grants enhanced the visitor experience for those visiting the Museum and informed Broadway residents of services and amenities available at their doctor's surgery. 3. Purchasing and refurbishing a defunct BT telephone kiosk and installing a defibrillator in the village centre to aid emergency treatment of heart attacks.

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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The general account of the Broadway Trust showed a deficit for the year of £3,037. However the Trust maintained deposits of £7,034 in its bank accounts and investments valued at £230,084. Its financial position was healthy
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	It is the policy of the Trust to hold reserves to meet recurring expenses of the Trust and to fund grants.
Amount of reserves held	Para 1.22	Liquid reserves amounted to £7,034.
Reasons for holding zero reserves	Para 1.22	Not applicable.
Details of fund materially in deficit	Para 1.24	Not applicable
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	Not applicable

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Subscriptions, rents, interest on deposits and dividends on investments.
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Constitution.
How is the charity constituted? (e.g unincorporated association , CIO)	Para 1.25	Charitable incorporated organisation.
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Selected and appointed by Trustees, elected at AGM

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	Broadway Trust
Other name the charity uses	
Registered charity number	1166355
Charity's principal address	72 High Street, Broadway, Worcestershire WR12 7AJ

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)	Christopher Hotten KC	
Full name(s)	Christopher Peter Hotten KC	
Position (eg Secretary, Chair, etc)	Chair of Trustees	
Date	20 th October 2025	

Broadway Trust Profit and Loss 31.12.24

Income

Members	£	3,035.00	
Interest	£	100.44	
Gift Aid			
Rent	£	1,000.00	
Donation	£	2,000.00	
Social Event Tickets			
			£ 6,135.44

Charitable Expenditure

Grants			£ 1,000.00
Gross Profit/Loss			£ 5,135.44

Overheads

Marketing	£	424.00	
Maintenance	£	6,165.60	
Hire Charge			
Insurance	£	1,109.47	
AGM/Social Event Expenses	£	131.35	
Professional Fees			
Donations	£	100.00	
Advertising	£	450.00	
Bank Charges	£	62.80	
			£ 8,443.22
Net Profit/Loss			-£ 3,307.78

THE BROADWAY TRUST

England & Wales - Charity number 1166355

Accounts



Trustees' Annual Report for the period

From **01/01/2023** To **31/12/2023**

Charity name: **The Broadway Trust**

Charity registration number: **1166355**

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<ol style="list-style-type: none">1. To encourage high standards of architecture and planning in or affecting the village of Broadway and its surrounding area.2. To stimulate public interest in the history, architecture and landscape of Broadway3. To encourage the preservation, protection and improvement of features of historic interest or general public amenity4. To support and maintain those amenities necessary for a strong community spirit in Broadway
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<ol style="list-style-type: none">1. Managing and maintaining lands owned by the Broadway Trust for the benefit of the Broadway community.2. Expanding and supporting the Membership of the Broadway Trust.3. Awarding grants to local bodies in accordance with the Constitution of the Broadway Trust.4. Reviewing and where appropriate commenting upon planning applications within the parish of Broadway.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Yes.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
	Para 1.38	

Policy on grant making		
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<ol style="list-style-type: none"> 1. Awarding grants in the total sum of £2,708.22; £1,000 to Broadway Parish Church as a contribution towards the replacement of a disabled lift, £1,000 and £708.22 to Broadway First School project. 2. These grants enabled disabled access to the Church and contributed towards the external appearance of the school.

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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The general account of the Broadway Trust showed a small deficit for the year of £1,039.93. However the Trust maintained deposits of £10,342.24 in its bank accounts and investments valued at £222,374.26. Its financial position was healthy
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	It is the policy of the Trust to hold reserves to meet recurring expenses of the Trust and to fund grants.
Amount of reserves held	Para 1.22	Liquid reserves amounted to £10,342.24.
Reasons for holding zero reserves	Para 1.22	Not applicable.
Details of fund materially in deficit	Para 1.24	Not applicable
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	Not applicable

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Subscriptions, rents, interest on deposits and dividends on investments.
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Constitution.
How is the charity constituted? (e.g unincorporated association , CIO)	Para 1.25	Charitable incorporated organisation.
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Selected and appointed by Trustees, elected at AGM

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	Broadway Trust
Other name the charity uses	
Registered charity number	1166355
Charity's principal address	72 High Street, Broadway, Worcestershire WR12 7AJ

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Christopher Hotten KC	Chair		AGM
2	Andrew Dakin	Hon Secretary		AGM
3	Julieanne McGrigor	Hon Treasurer	From 1 st Sepember 2024	Trustees
4	Robin Goldsmith			AGM
5	Michael de Navarro KC			AGM
6	Robert Fulton			AGM
7	James Peace		From 12 th May 2023	AGM
8	Tom Morris		From 21 st July 2023	AGM
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Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

Christopher Hotten

Full name(s)

Christopher Peter Hotten KC

**Position (eg Secretary,
Chair, etc)**

Chair of Trustees

Date

14/10/24

THE BROADWAY TRUST

BALANCE SHEET AS AT 31ST DECEMBER 2023

General Account 31.12.22	£ 8,673.93		
Deficit for the year	£ 1,039.91		
	<u>£ 7,634.02</u>		
Property Account	£ 11,700.00		
Investment Account	£ 222,374.26		
			<u>£ 241,708.28</u>
PROPERTY			
10.30 Acres Tower Farm at cost acquired 26th August 1980			£ 7,700.00
The remnants of the former Manor of Broadway, comprising the title to the Lordship, the greens & roadside waste at cost Acquired 11th January 1985			<u>£ 4,000.00</u> £ 11,700.00
INVESTMENTS			
Tilney Portfolio at cost December 2023			£ 222,374.26
BANK BALANCES 31.12.23			
Treasurer Account			£ 3,842.24
Transfer from Evelyn			£ 2,708.22
Deposit Account			£ 6,500.00
			£ 7,634.02
			<u>£ 241,708.28</u>

CJ Bishop 18/4/24
CJ Bishop, Hon Treasurer

K Beasley 13/4/24
K Beasley, Hon Auditor

THE BROADWAY TRUST

England & Wales - Charity number 1166355

Accounts



Trustees' Annual Report for the period

Period start date: 01 January 2022
 Period end date: 31 December 2022
 From To

Section A Reference and administration details

Charity name: The Broadway Trust

Other names charity is known by:

Registered charity number (if any): 1166355

Charity's principal address: 24 Gordon Close
 Broadway
 Postcode: WR12 7BJ

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Robin Goldsmith	Chairman		AGM
2	Andrew Dakin	Secretary		AGM
3	Christopher Hotten KC			AGM
4	Michael de Navarro KC			AGM
5	Rob Fulton			AGM
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Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document <i>(eg. trust deed, constitution)</i>	Constitution
How the charity is constituted <i>(eg. trust, association, company)</i>	Charitable Incorporated Organisation
Trustee selection methods <i>(eg. appointed by, elected by)</i>	Appointed by Trustees, elected at AGM

Additional governance issues (Optional information)

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

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

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Section C Objectives and activities

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

- | |
|--|
| <ul style="list-style-type: none"> a. 'To encourage high standards of architecture and planning in or affecting the village of Broadway and its surrounding area. b. To stimulate public interest in the history, architecture and landscape of Broadway. c. To encourage the preservation, protection and improvement of features of historic interest or general public amenity. d. To support and maintain those amenities necessary for a strong community spirit in Broadway. |
|--|

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

To meet these purposes, the Trustees have followed the advice issued by the Charity Commission on public benefit. Specifically,

- The Trustees continue to consider and comment to the Wychavon District Council on planning applications having regard to national and local policies in order to protect the character and appearance of the village.
- The Trustees have played an active role in contributing to the production of the Broadway Neighbourhood Development Plan, which was accepted by referendum on 15th September 2022.
- The Trust has been active in organising a programme of restoring the benches around the village and in installing new benches so that visitors can sit and enjoy the Green in the centre of the village.
- The Trust works with the Parish Council to maintain the grounds and trees owned by the Trust in the centre of the village so that they can continue to be enjoyed by villagers and visitors alike.
- The Trust has worked with local organisations and one first school to help fund the restoration of the plantings in front of the school.
- The Trust regularly advertises that it is willing to make small grants to village organisations that are willing to apply.
- The Trust coordinates with village organisations and the Parish Council to ensure the Greens are available for use.

Additional details of objectives and activities (Optional information)

The Trust has established a grant fund based on the income from investments. It has made this available to any local village organisation that applies meeting the basic criteria. These are published on the website and regularly highlighted in village publications.

Our investments are held by Evelyn Partners who manage them to create an annual income. Individual investments within the portfolio are regularly reviewed and changed where necessary.

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

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

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

The Trust was actively involved in finalising the contents of the Broadway Neighbourhood Development Plan, which was completed in August and accepted at referendum in September 2022. It has subsequently been adopted by Wychavon District Council, now being given significant weight in planning considerations.

The Trust continues to be actively involved, working with the Parish Council, in monitoring and commenting on planning applications that seem to be over-ambitious, do not reflect the architectural vernacular of Broadway or might damage the culturally important streetscape of the centre of this historic Cotswold village.

The Trust is responsible for maintaining in good condition the historic manorial wastes in the centre of the village so that they may continue to be enjoyed by visitors and villagers alike. This maintenance includes both the grassed areas and the mature trees that border them.

Section E

Financial review

Brief statement of the charity's policy on reserves

The Trust maintains a small reserve in a deposit account in addition to our investments.

The investment fund includes another small reserve (c.£2,000) held in a cash account from which grants may be made to local organisations that apply and meet the defined criteria.

Details of any funds materially in deficit

None.

Further financial review details (Optional information)

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

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

The Trust made a grant to Broadway First School to clear the frontage of the school which had fallen into disrepair. The grant also paid for the clearance of scrub that had grown up at the eastern end of the school's frontage and re-grassing of the area cleared. Two silver birch trees were planted.

Section F

Other optional information


Section G

Declaration

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

Signed on behalf of the charity's trustees

Signature(s)



Full name(s)

Robin James Darragh Goldsmith

Position (eg Secretary, Chair, etc)

Chairman

Date

11 Oct 2023

THE BROADWAY TRUST

BALANCE SHEET AS AT 31ST DECEMBER 2022

	PROPERTY		
General Account 31.12.21	£ 10,982.20	10.30 Acres Tower Farm at cost acquired 26th August 1980	£ 7,700.00
Deficit for the year	-£ 3,358.27		
	£ 7,623.93	The remnants of the former Manor of Broadway, comprising the title to the Lordship, the greens & roadside waste at cost	
Property Account	£ 11,700.00	Acquired 11th January 1985	£ 4,000.00
Investment Account	£ 209,624.50		£ 11,700.00
		INVESTMENTS	
		Tilney Portfolio at cost December 2022	£ 209,624.50
		BANK BALANCES 31.12.22	
		Treasurer Account	£ 2,686.93
		Transfer from Evelyn	-£ 1,050.00
		Income o/s year end	£ 255.00
		Chq 101080 uncleared year end	-£ 768.00
		Deposit Account	£ 6,500.00
			£ 7,623.93
			£ 228,948.43

THE BROADWAY TRUST

PROFIT & LOSS AS AT 31ST DECEMBER 2022

Income

Members	£	2,305.00	
Rent	£	800.00	
Interest	£	11.50	
Social Event Tickets	£	795.00	
			£ 3,911.50

Direct Expenses

Grants	£	900.00	
Marketing	£	2,480.00	
Website	£	149.99	
			£ 3,529.99

Gross Profit/Loss £ **381.51**

Overheads

Maintenance	£	1,638.00	
Printing and Stationery	£	239.00	
Hire Charge	£	54.00	
Insurance	£	1,002.24	
Expenses (AGM & Lectern)	£	274.74	
Donation	£	50.00	
Subscription	£	36.00	
HMRC	£	200.00	
Social Event	£	175.00	
Bank Charges and Interest	£	70.80	
			£ 3,739.78

Net Profit/Loss -£ **3,358.27**

THE BROADWAY TRUST

PROFIT & LOSS AS AT 31ST DECEMBER 2022

Income

Members	£	2,305.00	
Rent	£	800.00	
Interest	£	11.50	
Social Event Tickets	£	795.00	
			£ 3,911.50

Direct Expenses

Grants	£	900.00	
Marketing	£	2,480.00	
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Gross Profit/Loss £ **381.51**

Overheads

Maintenance	£	1,638.00	
Printing and Stationery	£	239.00	
Hire Charge	£	54.00	
Insurance	£	1,002.24	
Expenses (AGM & Lectern)	£	274.74	
Donation	£	50.00	
Subscription	£	36.00	
HMRC	£	200.00	
Social Event	£	175.00	
Bank Charges and Interest	£	70.80	
			£ 3,739.78

Net Profit/Loss -£ **3,358.27**

THE BROADWAY TRUST

England & Wales - Charity number 1166355

Accounts



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	January	2021		31	December	2021

Section A Reference and administration details

Charity name The Broadway Trust

Other names charity is known by

Registered charity number (if any) 1166355

Charity's principal address 24 Gordon Close
 Broadway
Postcode WR12 7BJ

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Robin Goldsmith	Chairman		AGM
2	Andrew Dakin	Secretary		AGM
3	Graham Love	Planning		AGM
4	Christopher Hotten			AGM
5	Michael de Navarro			AGM
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Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Appointed by Trustees, elected by AGM

Additional governance issues (Optional information)

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

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

Section C Objectives and activities

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

- a. 'To encourage high standards of architecture and planning in or affecting the village of Broadway and its surrounding area.
- b. To stimulate public interest in the history, architecture and landscape of Broadway.
- c. To encourage the preservation, protection and improvement of features of historic interest or general public amenity.
- d. To support and maintain those amenities necessary for a strong community spirit in Broadway.

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

- To meet these purposes, the Trustees have followed the advice issued by the Charity Commission on public benefit. Specifically,
- The Trustees consider and comment to the LPA on planning applications having regard to national and local policies in order to protect the character and appearance of the village.
 - The Trustees have played an active role in contributing to the production of the Broadway Neighbourhood Development Plan, which was accepted by referendum on 15th September 2022.
 - The Trust has been active in organising a programme of restoring the benches around the village and in installing new benches so that visitors can sit and enjoy the Green in the centre of the village.
 - The Trust works with the Parish Council to maintain the grounds and trees owned by the Trust in the centre of the village so that they can continue to be enjoyed by villagers and visitors alike.
 - The Trust has worked with local organisations and one first school to help fund the restoration of the plantings in front of the school, which had fallen into a bad state of repair.
 - The Trust regularly advertises that it is willing to make small grants to village organisations who are willing to apply.

Additional details of objectives and activities (Optional information)

The Trust has established a grant fund based on the income from investments. It has made this available to any local village organisation that applies meeting the basic criteria. These are published on the website and regularly highlighted in village publications.

Our investments are held by Evelyn Partners who manage them to create an annual income. Individual investments within the portfolio are regularly reviewed and changed where necessary.

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

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

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

2021 was a difficult year, as the village, its organisations and businesses recovered from CoVid. The Trust supported both the Gordon Russell Design Museum and the Broadway Museum and Art Gallery with grants to help them manage their loss of income from CoVid.

Brief statement of the charity's policy on reserves

The Trust maintains a small reserve in a deposit account in addition to our investments.

Details of any funds materially in deficit

None.

Further financial review details (Optional information)

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

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

Section F Other optional information

Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)		
Position (eg Secretary, Chair, etc)		
Date		

THE BROADWAY TRUST

England & Wales - Charity number 1166355

Accounts

Trustees' Report
The Broadway Trust
Registered CIO Number 1166355
2020-2021

General

The Trust continues to play an active part in the affairs of the village. It is represented at Parish Council meetings and has been represented on the Steering Committee of the Parish Council for the production of the Neighbourhood Plan which is nearing completion.

The principal practical function of the Trust is in the management of the land it owns in the centre of the village, including the Greens. This involves working with the Parish Council to ensure the grass is regularly cut and the trees on the Trust's land are properly inspected and maintained and that events organised on the Green are done so responsibly.

The Greens have been used this year for four major events.

- The Broadway Arts Festival used the Greens, for a week in July, to erect extensive tentage so that displays and demonstrations could be held under cover. They judged the biennial event to have been a great success attracting some thousands of visitors from the village and far wider across the country.
- The Broadway Car Show took place over a weekend in August. It drew in an extraordinary collection of modern supercars on the Saturday and a wonderful display of Classics on the Sunday. It was attended by between five and six thousand people.
- The Horticultural Show took place on one day in September. It received an excellent range of exhibits from local people, including their children.
- The Food Festival took place on one day in September. It was well supported by local traders and joined by a good range of traders from further afield. It included cookery demonstrations and provided a climbing wall for young people.

None of these events were organised by the Trust, whose only role was to ensure the events' organisers were properly constituted and the events were organised, insured and managed responsibly.

Membership

The Trust has 213 members, most of whom live within the Parish.

Planning

The Trust continues to monitor all planning applications within the Parish, though most of those are within the village boundary. The Trust only objects when an application contravenes established planning guidelines laid down in NPPF and similar regulations. Most Trust objections are upheld by the local planning authority.

Grant Funding

Grants were made to the two museums in the village to help support them due to the loss of visitor income during lockdown.

New benches were purchased by the Trust which have been installed on the edges of the Green. These have proved very popular with visitors. The Trust has funded the restoration of existing benches in the centre of the village, and on the Cotswold Way, above the village.

The Trust agreed to part-fund the creation of a space outside the Coach House Restaurant for one vehicle used by staff to come to work in the evening.

Conclusion.

It is the opinion of the Trustees that the Trust is in a good condition. It is financially secure. It continues to enjoy the support of the village community.

THE BROADWAY TRUST

Accounts for period 1st January 2020 to 31st December 2020

GENERAL ACCOUNT

2019			2019		
	Bank Balances 31.12.19			Payments 2020	
	Treasurer Account	£2,127.88	£1,336.00	Donations & Grants	£3,000.00
	Deposit Account	£12,500.00	£764.53	Insurance	£953.79
£14,383.07		£14,627.88	£36.00	Subscriptions	£36.00
			£2,056.70	Sundries	£9,350.49
				of which: Legal Costs	£4,500.00
				Benches (Purchase	
				Installation & Repair)	£2,241.92
				Coach House Bay	£1,102.18
				Website Update	£834.39
				Tree Maintenance	£672.00
	Receipts 2020			Bank Balances 31.12.20	
£2,480.00	Subscriptions	£2,580.00		Treasurer Account	£2,517.62
£790.00	Income from Investments	£3,000.00		Deposit Account	£6,500.00
£574.23	Gift Aid Tax Claim	£539.53	£2,127.88		
£9.35	Bank Interest	£10.49	£12,500.00		
£584.46	Special Events	£0.00			
£0.00	Rents	£1,600.00			£9,017.62
<u>£18,821.11</u>		<u>£22,357.90</u>	<u>£18,821.11</u>		<u>£22,357.90</u>



J.M.Oliver, Hon. Treasurer



K.Beasley, Hon. Auditor