



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## 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"><li>1. To encourage high standards of architecture and planning in or affecting the village of Broadway and its surrounding area.</li><li>2. To stimulate public interest in the history, architecture and landscape of Broadway</li><li>3. To encourage the preservation, protection and improvement of features of historic interest or general public amenity</li><li>4. To support and maintain those amenities necessary for a strong community spirit in Broadway</li></ol>
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"><li>1. Managing and maintaining lands owned by the Broadway Trust for the benefit of the Broadway community.</li><li>2. Expanding and supporting the Membership of the Broadway Trust.</li><li>3. Awarding grants to local bodies in accordance with the Constitution of the Broadway Trust.</li><li>4. Reviewing and where appropriate commenting upon planning applications within the parish of Broadway.</li></ol>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>Yes.</b>

### 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"> <li><b>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.</b></li> <li><b>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.</b></li> <li><b>Purchasing and refurbishing a defunct BT telephone kiosk and installing a defibrillator in the village centre to aid emergency treatment of heart attacks.</b></li> </ol>

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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	<b>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</b>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<b>It is the policy of the Trust to hold reserves to meet recurring expenses of the Trust and to fund grants.</b>
Amount of reserves held	Para 1.22	<b>Liquid reserves amounted to £7,034.</b>
Reasons for holding zero reserves	Para 1.22	<b>Not applicable.</b>
Details of fund materially in deficit	Para 1.24	<b>Not applicable</b>
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<b>Not applicable</b>

### 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	<b>Subscriptions, rents, interest on deposits and dividends on investments.</b>
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	<b>Constitution.</b>
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	<b>Charitable incorporated organisation.</b>
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	<b>Selected and appointed by Trustees, elected at AGM</b>

### 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	Julieanne McGrigor	Hon Treasurer		AGM
3	Tom Morris			AGM
4	James Peace			AGM
5	Michael de Navarro KC			AGM
6	Robert Fulton			AGM
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Corporate trustees – names of the directors at the date the report was approved

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

**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

<b>Signature(s)</b>	Christopher Hotten KC	
<b>Full name(s)</b>	Christopher Peter Hotten KC	
<b>Position (eg Secretary, Chair, etc)</b>	Chair of Trustees	

**Date**

20<sup>th</sup> 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			
			<b>£ 6,135.44</b>

### **Charitable Expenditure**

Grants			£ 1,000.00
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<b>Gross Profit/Loss</b>			<b>£ 5,135.44</b>
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### **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	
			<b>£ 8,443.22</b>

<b>Net Profit/Loss</b>			<b>-£ 3,307.78</b>
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