

# ENGAGEMALVERN

England & Wales · Charity number 1175088

## Details

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**Status** Registered

**Legal form** CIO

**Registered** 2017-10-10

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

## Contact

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**Address** 7 Willow Grove  
Malvern  
Worcestershire  
WR14 2SE

**Phone** 01684565708

**Website** [engagemalvern.org.uk](http://engagemalvern.org.uk)

## Activities

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**Objects:** THE OBJECTS FOR WHICH THE CHARITY IS ESTABLISHED ARE:TO DEVELOP THE CAPACITY AND SKILLS OF THE MEMBERS OF THE SOCIALLY AND ECONOMICALLY DISADVANTAGED, AND SOCIALLY DISADVANTAGED COMMUNITIES OF MALVERN AND ITS SURROUNDING VILLAGES IN SUCH A WAY THAT THEY ARE BETTER ABLE TO IDENTIFY, AND HELP MEET, THEIR NEEDS AND TO PARTICIPATE MORE FULLY IN SOCIETY.THE ADVANCEMENT OF EDUCATION FOR THE PUBLIC BENEFIT IN MALVERN AND SURROUNDING VILLAGES IN SOUTH WORCESTERSHIRE AND NORTH HEREFORDSHIRE IN THE AREAS OF CITIZENSHIP, SCIENCE, RELIGION, PHILOSOPHY AND ETHICS.

**Activities:** We aim to empower the local community to address key social justice issues and to advance education in citizenship, science, religion, ethics and philosophy.We will form alliances with community groups to negotiate with decision makers, will encourage debates on key social justice issues and hold weekend events on the issues described above.We operate in the wider Malvern area.

## Classification

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- **How:** Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body
- **What:** General Charitable Purposes, Education/training, Economic/community Development/employment, Human Rights/religious Or Racial Harmony/equality Or Diversity
- **Who:** Children/young People, Elderly/old People, People With Disabilities, Other Charities Or Voluntary Bodies, The General Public/mankind

## Geography

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- Herefordshire
- Worcestershire

## Finances

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Period end	Income	Expenditure	Assets	Employees
2024-10-31	£28,094	£27,594	-	-
2023-10-31	£16,935	£16,953	-	-
2022-10-31	£12,009	£11,393	-	-
2021-10-31	£16,464	£15,243	-	-
2020-10-31	£18,492	£14,063	-	-

## Trustees

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Name	Role	Appointed
Andrew Robert Webb	Chair	2015-04-08
PROF BARRY EDWARD JONES		2015-04-08
Stephen Goodenough		2021-01-27

**ENGAGEMALVERN**

England & Wales - Charity number 1175088

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# Accounts

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Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name

ENGAGE MALVERN

On accounts for the year ended

31ST OCTOBER 2024

Charity no (if any)

1175088

Set out on pages

1 - 16

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/10/2024

Responsibilities and basis of report

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention (~~other than that disclosed below~~\*) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

\* Please delete the words in the brackets if they do not apply.

Signed:

*[Signature]*

Date:

28/08/2025

Name:

LAURA CARTER

Relevant professional qualification(s) or body (if any):

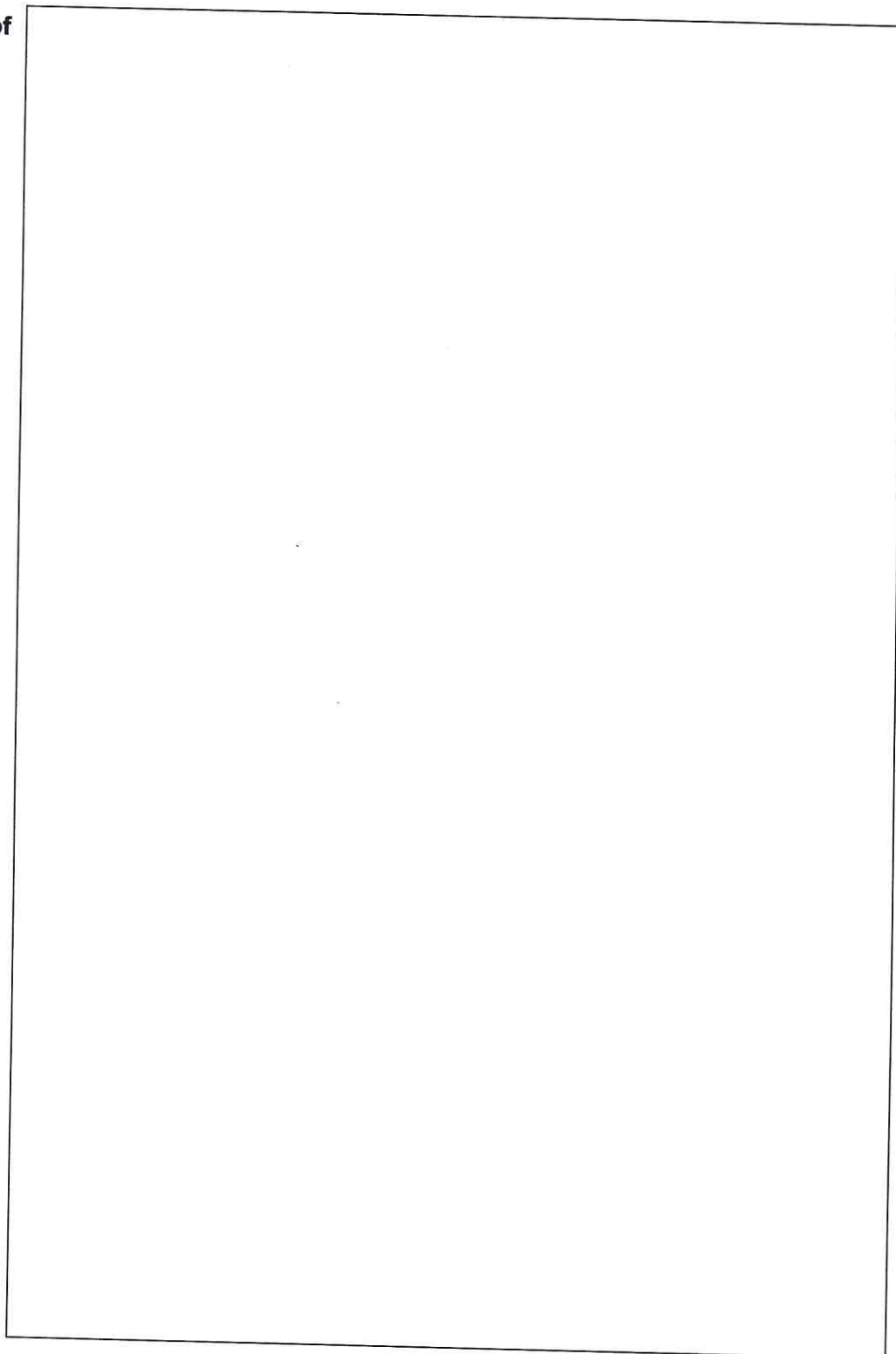
AAT

Address:

TAYLORHOBBS LIMITED, CHERRY TREES BARN,  
WALCOT LANE, DRAKES BROUGHTON, PERSHORE,  
WORCESTERSHIRE, WR10 2AL

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

**Give here brief details of any items that the examiner wishes to disclose.**



# EngageMalvern Treasurer's Annual Report for 2024

30<sup>th</sup> October 2024

Colin M. Reed, Treasurer

## Introduction

This report covers the period from 31<sup>st</sup> October 2023 (the end of the last financial year (FY) for us) to 30<sup>th</sup> October 2024, i.e. a complete financial year.

Currently, we have three separate accounts under the EngageMalvern (EM) umbrella which are summarised as follows.

1. Malvern Festival of Ideas (MFI).
2. South Worcestershire Community Land Trust (SWCLT).
3. EM Other – which covers other activities such as training and organising public debates on issues of local concern.

## 1. Malvern Festival of Ideas 2024

Income (£)		Expenditure (£)	
1. Transfer from previous FY	00.00	Reimbursement of costs (in four instalments)	27,593.90
2. Malvern Town Council grant	500.00		
3. Elmley Foundation grant	7,500.00		
4. Heart of England grant	1,000.00		
5. MHDC (for MFI 2024 & 2025)	1,000.00		
6. Total ticket sales	10,957.31		
7. Anonymous donation	7,136.59		
<b>Total income:</b>	<b>28,093.90</b>	<b>Total expenditure:</b>	<b>27,593.90</b>
<b>Balance: £500.00 (to be carried over for MFI 2025)</b>			

## Notes

- a) Andrew Webb, the Festival organiser, has settled all costs and expenses and has been fully reimbursed from the total income as shown above. (He holds the detailed accounts for the Festival.)
- b) We are very grateful to the Malvern Town Council Council for their grant of £500, to The Elmley Foundation for their grant of £7,500, to the Heart of England for their grant of

£1000 and, finally, to the Malvern Hills District Council (MHDC) for their grant for this year of £500. The latter has also awarded a grant of £500 for next year's Malvern Festival of Ideas (MFI 2025). That figure is included here.

- c) The anonymous donation of £7,136.59 made to settle the MFI 2024 account was gift aided. We can claim back 25% of this, i.e. £1,784.14, from HMRC which will go towards the costs of MFI 2025. The claim is pending and does not appear in this account.

## 2. South Worcestershire Community Land Trust (SWCLT)

Income (£)		Expenditure (£)	
Share capital transfer from previous FY (25 x £1 shares)	25.00	Transfer to EM Other Account	25.00
<b>Total income:</b>	<b>25.00</b>	<b>Total expenditure:</b>	<b>25.00</b>
<b>Balance: £00.00</b>			

### Notes

- a) The SWCLT ceased operations last year with no further income or expenditure to be taken into account this year.
- b) It was agreed at the last EM AGM on 22<sup>nd</sup> May 2024 to transfer the share capital of £25 from the SWCLT account to the 'EM Other' account as it seemed unlikely that the shareholders would want to claim their £1 each (in principle gifted to them by the SWCLT). They are free to do so if they wish.

## 3. EM Other

Income (£)		Expenditure (£)	
1. Transfer from previous FY.	1,153.98	None	
2. Transfer from SWCLT Account	25.00		
<b>Total income:</b>	<b>1,178.98</b>	<b>Total expenditure:</b>	<b>00.00</b>
<b>Balance: £1,178.98</b>			

### Note

There has been no activity under EM Other in the current financial year.

### **Bank balance**

The balances from the three accounts above total £1,678.98 which agrees with the total balance in the EM Co-operative Bank account on 30<sup>th</sup> October 2024.

**SUMMARY**

Coop Bank 1.11.2023 1178.98

**Income**

Malvern Festival of Ideas 28093.90

**29272.88**

**Expenditure**

Malvern Festival of Ideas 20153.90

Website development 7440.00

Coop Bank 31.10.2024 1678.98

**29272.88**

# Trustees' annual report for the period



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

Period start date 

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 Period end date 

3	1	1	0	2	4
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Charity name 

EngageMalvern
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 Charity No (if any) 

1	1	7	5	0	8	8
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## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The objectives of EM are: i) To develop the capacity and skills of the members of the socially disadvantaged communities of Malvern and its surrounding villages in such a way they are able to identify and help meet their needs and to participate more fully in society. ii) The advancement of education for the public benefit in Malvern and surrounding villages in South Worcestershire and North Herefordshire in the areas of citizenship, science, religion, philosophy and ethics.
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	Regarding its first objective, EngageMalvern (EM) promoted the establishment of SWCLT and has supported SWCLT to develop genuine affordable secure rentable homes in convenient locations in South Worcestershire, and particularly for those with working links in the localities of South Worcestershire and who are aged 16 to 35. WCLT was registered with the Financial Conduct Authority (FCA) in 2020 as a community benefit society (non-charity, registration number 8593) to give good operational flexibility and independence, although it was recognised that an annual corporation company tax return would be necessary and there would be liability to VAT for any larger income generated. Regarding its educational objective for the benefit of the community, EngageMalvern ran a weekend event called The Malvern Festival of ideas, on the theme of <i>Telling Tales</i> , which explored the power of storytelling, both in the narratives themselves but also in the ideas they convey.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have regard to the guidance issued by the Charities Commission on public benefit.

## Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	Volunteers have assisted with the delivery and organisation of the Malvern Festival of Ideas, helped with IT issues, including the maintenance of a website, and have joined working groups to provide ideas and experience for the transport and housing projects.
Other		

## Achievements and Performance

	SORP reference	
<p>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.</p>	<p>Para 1.20</p>	<p>Objective i) The charity EngageMalvern (EM) promoted the establishment of SWCLT and has supported SWCLT to develop genuine affordable secure rentable homes in convenient locations in South Worcestershire, and particularly for those with working links in the localities of South Worcestershire and who are aged 16 to 35. WCLT was registered with the Financial Conduct Authority (FCA) in 2020 as a community benefit society (non-charity, registration number 8593) to give good operational flexibility and independence, although it was recognised that an annual corporation company tax return would be necessary and there would be liability to VAT for any larger income generated.</p> <p>During the subsequent four-year period 2020-2024 seven land sites in the Malvern area have been actively pursued, including a rural exception landsite and a brownfield landsite. Draft architect plans for three of these sites have been developed based on off-site factory manufacture of quality one-bedroom independent sustainable homes, for 15-25 homes per site, and allowing for rapid installation of homes on the sites. A pre-planning assessment was obtained from the Malvern Hills District Council (MHDC) Planning Authority for a site owned by the Council and very convenient to all facilities (transport, shops, recreation) in the Malvern Town centre. With the support of Council housing officers SWCLT sought a Memorandum of Understanding (a non-legal MoU) for this site to enable a SWCLT application for grant-funding to be submitted to national housing development funders. Such funding is essential to provide finance to enable preparation and submission of a community planning application supported with site community engagement activities. Regrettably MHDC would not provide this necessary support.</p> <p>Working contacts were made with a regional housing association, with two Midlands housing charities supporting young adults, with the Worcestershire City Council housing department, and particular support was received from two Malvern councilors, the Malvern Civic Society and a local estate agent. The Worcester Diocese was unable to provide church-land possibilities. Full</p>

	<p>membership of the national Community Land Trust Network provided access to national monthly online seminars providing excellent information and contacts. The EM charity membership of the local Chamber of Commerce, and the EM provision of financial/banking support have both been very good.</p> <p>A review of the situation, particularly the lack of support from MHDC as identified above, was undertaken by trustees/secretary present at the September 2023 AGM, at a subsequent EM meeting, and the proposal to de-register SWCLT was approved. This was implemented by FCA on 5th April 2024. A final company annual tax return to HM Revenue &amp; Customs is due by 31st March 2025; this will simply advise "no trading" during the period.</p> <p>Objective ii): This year, the Malvern Festival of Ideas had the title, of Telling Tales, which explored the power of storytelling, both in the narratives themselves but also in the ideas they convey. The power of storytelling lies not only in the narratives themselves but also in the ideas they convey. Stories have the remarkable ability to introduce, explore, and propagate ideas in a compelling and impactful way. They can communicate complex concepts, moral dilemmas, and philosophical insights with depth and nuance. By weaving ideas into narratives, storytellers can challenge existing beliefs, inspire new perspectives, and spark transformative change. Stories provide a fertile ground for exploring thought-provoking themes, tackling societal issues, and examining the human condition. They ignite our curiosity, encourage critical thinking, and invite us to reflect on our own beliefs and values. Through the interplay of ideas and storytelling, we are presented with an opportunity to engage with and shape the world around us, as ideas take root and grow within the fertile soil of the human imagination</p> <p>In the previous year we received a grant from the Elmley Foundation. The purpose of the grant was to commission a new website, and visual identity and marketing collateral, as set out in our application.</p> <p>The benefits were</p> <ul style="list-style-type: none"> <li>• a new website with a visual identity and framework allows annual consistency of evergreen information, as well as a visible refresh of content aligned to each year's programme and theme;</li> <li>• a strong visual identity of the Festival though a refreshed logo and set of simple design</li> </ul>
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		<p>and brand principles can applied across all future digital and print products.</p> <p>However, in addition, we believe that having this strong online presence enabled us to develop the 2025 Festival programme early, which in turn meant that publicity and promotion began earlier in the Festival year.</p> <p>The feedback from Festival-goers, workshop leaders, community groups for the 2024 Festival was extremely positive. One of its key features is its friendly atmosphere. It is a festival where people can engage each other in conversation. It involves community groups – there were stalls by several local groups and some of the <i>Exploring The Theme</i> sessions were led by local people.</p> <p>This was the third in-person event since the pandemic and took place at Malvern St James Girls' School.</p> <p>The programme included prominent names from the world of science, politics, economics and literature. The opening speaker was Chris Packham who told the story of how Earth's most incredible creations – life and intelligence – are set to have the same lasting impact on Earth's story as any meteorite or earthquake. Other speakers included Mairia Cahill, Ben Garrod, Yasmin Alibhai-Brown, Marina Cantacuzino and Randall Wright.</p> <p>In addition, we had a special event for schools with Onjali Rauf at Malvern Cube on the Friday of the Weekend.</p>
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### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Achievements against objectives set	Para 1.41	The feedback from the public for the educational event was highly favorable and the event is deemed to meet the objective of advancing the education of the local community in the areas of citizenship, science, religion, philosophy and ethics.
Performance of fundraising activities against objectives set	Para 1.41	Fund-raising was achieved through donations and helped EngageMalvern meet its objectives for the year.
Investment performance against objectives	Para 1.41	No investments

Other		
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## Financial Review

	SORP reference	
Review of the charity's financial position at the end of the period	Para 1.21	The total income for this financial year was £28,093.90. The total expenditure was £27,593.90. This left a balance (credit) of £1679 which was intended to support the charities objectives in the following financial year.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	EngageMalvern currently does not have a policy of building up reserves to support future activities. It aims to at least balance books at the end of a financial year. Any surplus is already earmarked for the next year's activities and is too small to be considered a proper reserve.
Amount of reserves held	Para 1.22	Beyond the credit of £1679 noted above (and the expected gift-aid tax return), none.
Reasons for holding zero reserves	Para 1.22	A policy for holding reserves has not been considered yet. Realistically, the current level of income above expenditure does not allow it.
Details of fund materially in deficit	Para 1.24	The charity is not in financial deficit
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	There are no current uncertainties about the charity as a going concern

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
The charity's principal sources of funds (including any fundraising)	Para 1.47	This year, funding was by voluntary donations (some gift-aided), a single local government grant and sales of tickets for some organised events under the 'Malvern Festival of Ideas' initiative.
Investment policy and objectives including any social investment policy adopted	Para 1.46	Not applicable.
A description of the principal risks facing the charity	Para 1.46	
Other		

## Structure, Governance and Management

Description of charity's trusts:	SORP reference	
Type of governing document (trust deed, royal charter)	Para 1.25	Founding constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	Trustees are appointed by the Trustee Board and these appointments are ratified at the AGM.

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
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	EngageMalvern has a board of Trustees. As below it is actively seeking alliances with like-minded organisations and is working with a wide range of Local Authorities, Business networks, including the local Chamber of Commerce, the Church of England, as well experts in transport and housing.
Relationship with any related parties	Para 1.51	The Trustees seek to form alliances with other like-minded bodies and Institutions to help it meet its objectives.
Other		

## Reference and Administrative details

Charity name	EngageMalvern
Other name the charity uses	-
Registered charity number	1175088
Charity's principal address	7 Willow Grove, Malvern, Worcestershire, WR14 2SE

### 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	Andrew Webb	Chairperson		Trustee Board
2	Barry Jones			
3	Stephen Goodenough			
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20				

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	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	None
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

### 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

## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)



Full name: Andrew Robert  
Webb

Position: Acting Chairperson

Date: 13<sup>th</sup> August 2025

**ENGAGEMALVERN**

England & Wales - Charity number 1175088

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# Accounts

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# Trustees' annual report for the period



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

Period start date 

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 Period end date 

3	1	1	0	2	3
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Charity name 

EngageMalvern					
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 Charity No (if any) 

1	1	7	5	0	8	8
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## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The objectives of EM are: i) To develop the capacity and skills of the members of the socially disadvantaged communities of Malvern and its surrounding villages in such a way they are able to identify and help meet their needs and to participate more fully in society. ii) The advancement of education for the public benefit in Malvern and surrounding villages in South Worcestershire and North Herefordshire in the areas of citizenship, science, religion, philosophy and ethics.
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	Regarding its first objective, EngageMalvern (EM) promoted the establishment of SWCLT and has supported SWCLT to develop genuine affordable secure rentable homes in convenient locations in South Worcestershire, and particularly for those with working links in the localities of South Worcestershire and who are aged 16 to 35. WCLT was registered with the Financial Conduct Authority (FCA) in 2020 as a community benefit society (non-charity, registration number 8593) to give good operational flexibility and independence, although it was recognised that an annual corporation company tax return would be necessary and there would be liability to VAT for any larger income generated. Regarding its educational objective for the benefit of the community, EngageMalvern ran a weekend event called The Malvern Festival of ideas, on the theme of As Time Goes By, which explored the concept of being a good ancestor
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have regard to the guidance issued by the Charities Commission on public benefit.

## Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	Volunteers have assisted with the delivery and organisation of the Malvern Festival of Ideas, helped with IT issues, including the maintenance of a website, and have joined working groups to provide ideas and experience for the transport and housing projects.
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	<p>Objective i) The charity EngageMalvern (EM) promoted the establishment of SWCLT and has supported SWCLT to develop genuine affordable secure rentable homes in convenient locations in South Worcestershire, and particularly for those with working links in the localities of South Worcestershire and who are aged 16 to 35. WCLT was registered with the Financial Conduct Authority (FCA) in 2020 as a community benefit society (non-charity, registration number 8593) to give good operational flexibility and independence, although it was recognised that an annual corporation company tax return would be necessary and there would be liability to VAT for any larger income generated.</p> <p>During the subsequent four-year period 2020-2024 seven land sites in the Malvern area have been actively pursued, including a rural exception landsite and a brownfield landsite. Draft architect plans for three of these sites have been developed based on off-site factory manufacture of quality one-bedroom independent sustainable homes, for 15-25 homes per site, and allowing for rapid installation of homes on the sites. A pre-planning assessment was obtained from the Malvern Hills District Council (MHDC) Planning Authority for a site owned by the Council and very convenient to all facilities (transport, shops, recreation, etc.) in the Malvern Town centre. With the support of Council housing officers SWCLT sought a Memorandum of Understanding (a non-legal MoU) for this site to enable a SWCLT application for grant-funding to be submitted to national housing development funders. Such funding is essential to provide finance to enable preparation and submission of a community planning application supported with site community engagement activities. Regrettably MHDC would not provide this necessary support.</p> <p>Working contacts were made with a regional housing association, with two Midlands housing charities supporting young adults, with the Worcestershire City Council housing department, and particular support was received from two Malvern councilors, the Malvern Civic Society and a local estate agent. The Worcester Diocese was</p>

	<p>unable to provide church-land possibilities. Full membership of the national Community Land Trust Network provided access to national monthly online seminars providing excellent information and contacts. The EM charity membership of the local Chamber of Commerce, and the EM provision of financial/banking support have both been very good.</p> <p>Objective ii): This year, the Malvern Festival of Ideas had the title, As Time Goes By, which explores the concept of being a good ancestor as well as examining how we handle the legacies handed down to us. Can we become good ancestors and work towards creating a different future from the trajectory we are on now? How do we handle the legacy handed down to us? What are the issues we need to reconcile ourselves with? How do we see ourselves in the history of life on earth? What are the timescales we should be working to?</p> <p>There was increased attendance this year, with over 1000 people attending at least one session and over 2000 session tickets sold. Many people were local, but others travelled for the weekend from Manchester, Bristol, Worksop, St Albans, South Wales, Devon, Andover, Oxford, that I know of. There were some sessions that were very busy (Alice Roberts and Benjamin Zephaniah) and others less so.</p> <p>The feedback from Festival-goers, workshop leaders, community groups was extremely positive. One of its key features is its friendly atmosphere. It is a festival where people can engage each other in conversation. It involves community groups – there were stalls by several local groups and some of the <i>Exploring The Theme</i> sessions were led by local people.</p> <p>This was the second in-person event since the pandemic and took place at Malvern St James Girls' School.</p> <p>The programme included prominent names from the world of science, politics, economics and literature. The opening speaker was Professor Alice Roberts on Archaeology in the age of genetics. Other speakers included Benjamin Zephaniah, Melissa Benn, Priyamvada Gopal, Megan McCubbin and Rob Hopkins</p> <p>In addition, we had a special event for schools with Michael Rosen at Malvern Cube on the Friday of</p>
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		the Weekend.
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### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Achievements against objectives set	Para 1.41	The feedback from the public for the educational event was highly favorable and the event is deemed to meet the objective of advancing the education of the local community in the areas of citizenship, science, religion, philosophy and ethics.
Performance of fundraising activities against objectives set	Para 1.41	Fund-raising was achieved through donations and helped EngageMalvern meet its objectives for the year.
Investment performance against objectives	Para 1.41	No investments
Other		

## Financial Review

	SORP reference	
Review of the charity's financial position at the end of the period	Para 1.21	The total income for this financial year was £16935. The total expenditure was £16953. This left a balance (credit) of £1179 which was intended to support the charities objectives in the following financial year.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	EngageMalvern currently does not have a policy of building up reserves to support future activities. It aims to at least balance books at the end of a financial year. Any surplus is already earmarked for the next year's activities and is too small to be considered a proper reserve.
Amount of reserves held	Para 1.22	Beyond the credit of £1179 noted above (and the expected gift-aid tax return), none.
Reasons for holding zero reserves	Para 1.22	A policy for holding reserves has not been considered yet. Realistically, the current level of income above expenditure does not allow it.
Details of fund materially in deficit	Para 1.24	The charity is not in financial deficit
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	There are no current uncertainties about the charity as a going concern

### Additional information (optional)

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	SORP reference	
The charity's principal sources of funds (including any fundraising)	Para 1.47	This year, funding was by voluntary donations (some gift-aided), a single local government grant and sales of tickets for some organised events under the 'Malvern Festival of Ideas' initiative.
Investment policy and objectives including any social investment policy adopted	Para 1.46	Not applicable.
A description of the principal risks facing the charity	Para 1.46	
Other		

## Structure, Governance and Management

Description of charity's trusts:	SORP reference	
Type of governing document (trust deed, royal charter)	Para 1.25	Founding constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	Trustees are appointed by the Trustee Board and these appointments are ratified at the AGM.

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
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	EngageMalvern has a board of Trustees and a subgroup charged with fund-raising and to develop community-led projects. As below it is actively seeking alliances with like-minded organisations and is working with a wide range of Local Authorities, Business networks, including the local Chamber of Commerce, the Church of England, as well experts in transport and housing.
Relationship with any related parties	Para 1.51	The Trustees seek to form alliances with other like-minded bodies and Institutions to help it meet its objectives.
Other		

## Reference and Administrative details

Charity name	EngageMalvern
Other name the charity uses	-
Registered charity number	1175088
Charity's principal address	7 Willow Grove, Malvern, Worcestershire, WR14 2SE

### 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	Andrew Webb	Chairperson		Trustee Board
2	Barry Jones			
3	Stephen Goodenough			
4	Marcus Cleaver			
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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	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	None
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

### 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

## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)



Full name: Andrew Robert  
Webb

Position: Acting Chairperson

Date: 2<sup>nd</sup> August 2024

# EngageMalvern Treasurer's Report for Financial Year Ending October 2023

21<sup>st</sup> May 2024 - for 2024 Annual General Meeting

Colin M. Reed

## Introduction

This report covers the period 31<sup>st</sup> October 2022 (the end of the previous financial year for us) to 30<sup>th</sup> October 2023.

Currently, there are three separate accounts under the EM umbrella which are summarised as follows.

1. Malvern Festival of Ideas (MFI 2023).
2. South Worcestershire Community Land Trust (SWCLT).
3. EM Other – which covers other activities such as training and organising public debates on issues of local concern. Because of the restrictions on public gatherings, following the COVID19 pandemic, and concentration on efforts elsewhere, this was relatively dormant over the year.

## 1. Malvern Festival of Ideas

Income (£)		Expenditure (£)	
1. Transfer from previous FY	51.45	1. Part reimbursement (1)	10,000.00
2. Total ticket sales and fees	15,289.45	2. Part reimbursement (2)	6,340.90
3. Hibbert Trust grant	500.00		
4. MHDC grant	500.00		
<b>Total income:</b>	<b>16,340.90</b>	<b>Total expenditure:</b>	<b>16,340.90</b>
<b>Balance:</b>	<b>£00.00</b>		

## Notes

- a) Andrew Webb, the Festival organiser, settled all costs and expenses and was *part* reimbursed as requested from the total income. He holds the detailed accounts for the Festival.
- b) We are very grateful to the Malvern Hills District Council (MHDC) for their grant of £500 and to the Hibbert Trust for their grant also of £500.

## 2. South Worcestershire Community Land Trust (SWCLT)

This part of the current report duplicates a separate treasurer's report delivered to the SWCLT members on 21<sup>st</sup> August 2023. It remains up to date.

Income (£)		Expenditure (£)	
1. Share capital transfer from previous financial year (25 x £1 shares)	25.00	1. CLTN membership fee	375.00
2. Donation to cover CLTN membership fee	375.00	2. HMRC penalty	200.00
3. Donations to cover HMRC penalty	200.00		
<b>Total income:</b>	<b>600.00</b>	<b>Total expenditure:</b>	<b>575.00</b>
		<b>Balance as share capital to be retained:</b>	<b>25.00</b>

### Notes

- a) CLTN is the Community Land Trust Network.
- b) The penalty exacted by His Majesty's Revenue and Customs (HMRC) was for incorrect and late submission of a Corporation Tax form. Although SWCLT is non-profit-making and, therefore, has nothing to tax, it still has to submit annual Corporation Tax forms. The issues leading to the penalty have been resolved.
- c) The shares were bought for the 25 members of SWCLT as a gift and are now owned by them. Their total value must be retained as a minimum balance within the EngageMalvern SWCLT account to cover part or all of it being redeemed.

### 3. EM Other

Income (£)		Expenditure (£)	
1. Transfer from previous FY	1,171.95	Reimbursement for cost of maps to support SWCLT activities	37.20
2. Amazon Prime scheme	19.23		
<b>Total income:</b>	<b>1,191.18</b>	<b>Total expenditure:</b>	<b>37.20</b>
<b>Balance:</b>	<b>£1,153.98</b>		

#### Notes

- a) In past years income into the EM Other account has depended on a couple of generous donors. These have now moved on. There is no predictable income now.
- b) The Amazon Prime scheme has now ended. There will be no further income from this source.

#### Bank balance

The balances from the three accounts above total £1,178.98 which agrees with the total balance in the EM Co-operative Bank account.

**ENGAGEMALVERN**

England & Wales - Charity number 1175088

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# Accounts

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# Trustees' annual report for the period



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

Period start date 

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 Period end date 

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Charity name 

EngageMalvern
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 Charity No (if any) 

1	1	7	5	0	8	8
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## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The objectives of EM are: i) To develop the capacity and skills of the members of the socially disadvantaged communities of Malvern and its surrounding villages in such a way they are able to identify and help meet their needs and to participate more fully in society. ii) The advancement of education for the public benefit in Malvern and surrounding villages in South Worcestershire and North Herefordshire in the areas of citizenship, science, religion, philosophy and ethics.
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	Regarding its first objective, EngageMalvern (EM) progressed a project to set up a community-led housing project to provide truly affordable housing for both young people in training, such as apprentices, together with older people who are considering downsizing but wish to live in an intergenerational community setting. The intention is to build eco-friendly houses with assistive technology where required.  Regarding its educational objective for the benefit of the community, EngageMalvern ran a weekend event called The Malvern Festival of ideas, on the theme of Unity and Diversity.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have regard to the guidance issued by the Charities Commission on public benefit.

## Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	Volunteers have assisted with the delivery and organisation of the Malvern Festival of Ideas, helped with IT issues, including the maintenance of a website, and have joined working groups to provide ideas and experience for the transport and housing projects
Other		

## Achievements and Performance

	SORP reference	
<p>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.</p>	<p>Para 1.20</p>	<p>Objective i) EngageMalvern has progressed its long-term community-led projects on the ultimate provision of truly affordable housing through community-led housing schemes.</p> <p>The intention is to develop one or more truly affordable (rents 40-60% of commercial rates), community-led housing developments in the local area for young people in training/apprenticeships in a bid to help local businesses attract and retain staff, as well as for people 65 and over who are wanting to downsize and live in a thriving intergenerational community. It is intended that these homes will be carbon-neutral, built to a high enduring standard and use sustainable energy sources. For the older community, assistive technology will be incorporated. In the period covered by this report, Trustees have been consulting with a wide group of people.</p> <p>SWCLT was registered with the UK Financial Conduct Authority (FCA) in March 2021 (community benefit society- non-charity- no. 8593) following a one-year seed-corn government grant awarded to the UK charity EngageMalvern (incorporation no.1175088) in March 2020 via the national organisation Locality. SWCLT remains an affiliate of EngageMalvern and receives regular support from the charity and its supporters, including support from the Herefordshire and Worcestershire Chamber of Commerce of which EngageMalvern is a charity member.</p> <p>SWCLT follows its agreed FCA set of rules, with a Board of Trustees, Secretary, £1 share membership and supporters, an annual AGM, and Board meetings as required. Financial year end is 31st March, AGM is in September and Annual Return to FCA in October.</p> <p>SWCLT is a full member of the national charity Community Land Trust Network (CLTN), participates in CLTN activities and the monthly webinars, and has liability cover for its trustees and the Trust arranged via CLTN.</p> <p>Objective ii): EM ran a long weekend event in March 2022 called the Malvern Festival of Ideas on</p>

		<p>the title of 'Imagine'. The event took place in person this year. This was the first in-person event since the pandemic and numbers were down on previous in-person events. The programme included prominent names from the world of health, journalism, politics and finance. The opening speaker was Asad Rehman of War on Want. Other speakers included ecological economist and author Tim Jackson; former Welsh government minister Jane Davidson; former politician Dominic Grieve; journalist and author Will Hutton; children's author Onjali Rauf; scientist Tom McLeish; academic Nathan Waddell; campaigner Afraa Hashem.</p> <p>In addition, there was a programme of open-access science talks for all ages on the Saturday. These included topics such as Million Dollar Maths with Tom Crawford; Wildlife Chain Reactions led by Lucy Eckersley and storytelling with Bernadette Russell</p>
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### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Achievements against objectives set	Para 1.41	The feedback from the public for the educational event was highly favorable and the event is deemed to meet the objective of advancing the education of the local community in the areas of citizenship, science, religion, philosophy and ethics.
Performance of fundraising activities against objectives set	Para 1.41	Fund-raising was achieved through donations and helped EngageMalvern meet its objectives for the year.
Investment performance against objectives	Para 1.41	No investments
Other		

## Financial Review

	SORP reference	
Review of the charity's financial position at the end of the period	Para 1.21	The total income for this financial year was £12009. The total expenditure was £11393. This left a balance (credit) of £1248 which was intended to support the charities objectives in the following financial year.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	EngageMalvern currently does not have a policy of building up reserves to support future activities. It aims to at least balance books at the end of a financial year. Any surplus is already earmarked for the next year's activities and is too small to be considered a proper reserve.
Amount of reserves held	Para 1.22	Beyond the credit of £1248 noted above (and the expected gift-aid tax return), none.
Reasons for holding zero reserves	Para 1.22	A policy for holding reserves has not been considered yet. Realistically, the current level of income above expenditure does not allow it.
Details of fund materially in deficit	Para 1.24	The charity is not in financial deficit
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	There are no current uncertainties about the charity as a going concern

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
The charity's principal sources of funds (including any fundraising)	Para 1.47	This year, funding was by voluntary donations (some gift-aided), a single local government grant and sales of tickets for some organised events under the 'Malvern Festival of Ideas' initiative.
Investment policy and objectives including any social investment policy adopted	Para 1.46	Not applicable.
A description of the principal risks facing the charity	Para 1.46	
Other		

## Structure, Governance and Management

Description of charity's trusts:	SORP reference	
Type of governing document (trust deed, royal charter)	Para 1.25	Founding constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	Trustees are appointed by the Trustee Board and these appointments are ratified at the AGM.

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
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	EngageMalvern has a board of Trustees and a subgroup charged with fund-raising and to develop community-led projects. As below it is actively seeking alliances with like-minded organisations and is working with a wide range of Local Authorities, Business networks, including the local Chamber of Commerce, the Church of England, as well experts in transport and housing.
Relationship with any related parties	Para 1.51	The Trustees seek to form alliances with other like-minded bodies and Institutions to help it meet its objectives.
Other		

## Reference and Administrative details

Charity name	EngageMalvern
Other name the charity uses	-
Registered charity number	1175088
Charity's principal address	7 Willow Grove, Malvern, Worcestershire, WR14 2SE

### 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	Andrew Webb	Chairperson		Trustee Board
2	Barry Jones			
3	Stephen Goodenough			
4	Marcus Cleaver			
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## Reference and Administrative details

(cont)

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	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	None
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

### 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

## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)



Full name: Andrew Robert  
Webb

Position: Acting Chairperson

Date: 15<sup>th</sup> August 2023

**ENGAGEMALVERN**

England & Wales - Charity number 1175088

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# Accounts

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# Trustees' annual report for the period



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

Period start date 

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 Period end date 

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Charity name 

EngageMalvern
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Charity No (if any) 

1	1	7	5	0	8	8
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## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The objectives of EM are: i) To develop the capacity and skills of the members of the socially disadvantaged communities of Malvern and its surrounding villages in such a way they are able to identify and help meet their needs and to participate more fully in society. ii) The advancement of education for the public benefit in Malvern and surrounding villages in South Worcestershire and North Herefordshire in the areas of citizenship, science, religion, philosophy and ethics.
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	Regarding its first objective, EngageMalvern (EM) progressed a project to set up a community-led housing project to provide truly affordable housing for both young people in training, such as apprentices, together with older people who are considering downsizing but wish to live in an intergenerational community setting. The intention is to build eco-friendly houses with assistive technology where required.  Regarding its educational objective for the benefit of the community, EngageMalvern ran a weekend event called The Malvern Festival of ideas, on the theme of Unity and Diversity.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have regard to the guidance issued by the Charities Commission on public benefit.

## Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	Volunteers have assisted with the delivery and organisation of the Malvern Festival of Ideas, helped with IT issues, including the maintenance of a website, and have joined working groups to provide ideas and experience for the transport and housing projects
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	<p>Objective i) EngageMalvern has progressed its long-term community-led projects on the ultimate provision of truly affordable housing through community-led housing schemes.</p> <p>The intention is to develop one or more truly affordable (rents 40-60% of commercial rates), community-led housing developments in the local area for young people in training/apprenticeships in a bid to help local businesses attract and retain staff, as well as for people 65 and over who are wanting to downsize and live in a thriving intergenerational community. It is intended that these homes will be carbon-neutral, built to a high enduring standard and use sustainable energy sources. For the older community, assistive technology will be incorporated. In the period covered by this report, Trustees have been consulting with a wide group of people.</p> <p>South Worcestershire Community Land Trust (SWCLT) was incorporated in March 2021 and the first SWCLT AGM was held on 22nd September 2021. EM/SWCLT has engaged in confidential discussions with both the owner (and the land agent) of a 13-acre "green-field" land site, and then the local housing association.</p> <p>Objective ii): EM ran a long weekend event in March 2021 called the Malvern Festival of Ideas on the theme of 'Unity and Diversity'. The event took place online with the help of Zarucchi who managed the streaming of talks. The programme included prominent names from the world of health, journalism, politics and finance. The opening speaker was Shami Chakrabarti, speaking on 'Unity, Diversity and Hope for the Future'. Other speakers included author and historian Rachel Holmes; doctor and academic John Ashton; politician and author Vince Cable; economist Mervyn King; political commentator Paul Mason; climatologist Mark Maslin; philosopher Roman Krznaric; academic Kalwant Bhopal; and journalist Amelia Gentleman.</p> <p>Registering for the Festival enabled participants to put their questions to the speakers via the session host.</p> <p>In addition, there was a programme of open-access</p>

		science talks for all ages on the Saturday. These included topics such as The Science of Superheroes with Robert Walsh; Zooniverse for community building, led by Chicago-based astrophysicist Grace Wolf-Chase; and environmental impact of everyday tasks led by Scientists for Global Responsibility.
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### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Achievements against objectives set	Para 1.41	The feedback from the public for the educational event was highly favorable and the event is deemed to meet the objective of advancing the education of the local community in the areas of citizenship, science, religion, philosophy and ethics.
Performance of fundraising activities against objectives set	Para 1.41	Fund-raising was achieved through donations and helped EngageMalvern meet its objectives for the year.
Investment performance against objectives	Para 1.41	No investments
Other		

## Financial Review

	SORP reference	
Review of the charity's financial position at the end of the period	Para 1.21	The balance from the previous year was £1086. The total income for this financial year was £16464. The total expenditure was £15243. This left a balance (credit) of £1988 which was intended to support the charities objectives in the following financial year.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	EngageMalvern currently does not have a policy of building up reserves to support future activities. It aims to at least balance books at the end of a financial year. Any surplus is already earmarked for the next year's activities and is too small to be considered a proper reserve.
Amount of reserves held	Para 1.22	Beyond the credit of £1988 noted above (and the expected gift-aid tax return), none.
Reasons for holding zero reserves	Para 1.22	A policy for holding reserves has not been considered yet. Realistically, the current level of income above expenditure does not allow it.
Details of fund materially in deficit	Para 1.24	The charity is not in financial deficit
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	There are no current uncertainties about the charity as a going concern

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
The charity's principal sources of funds (including any fundraising)	Para 1.47	This year, funding was by voluntary donations (some gift-aided), a single local government grant and sales of tickets for some organised events under the 'Malvern Festival of Ideas' initiative. EngageMalvern was active in seeking further grants and other support to expand all its activities. (It started to achieve success here in the following financial year.)
Investment policy and objectives including any social investment policy adopted	Para 1.46	Not applicable.
A description of the principal risks facing the charity	Para 1.46	

Other		
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## Structure, Governance and Management

Description of charity's trusts:	SORP reference	
Type of governing document (trust deed, royal charter)	Para 1.25	Founding constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	Trustees are appointed by the Trustee Board and these appointments are ratified at the AGM.

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
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	EngageMalvern has a board of Trustees and a subgroup charged with fund-raising and to develop community-led projects. As below it is actively seeking alliances with like-minded organisations and is working with a wide range of Local Authorities, Business networks, including the local Chamber of Commerce, the Church of England, as well experts in transport and housing.
Relationship with any related parties	Para 1.51	The Trustees seek to form alliances with other like-minded bodies and Institutions to help it meet its objectives.
Other		

## Reference and Administrative details

Charity name	EngageMalvern
Other name the charity uses	-
Registered charity number	1175088
Charity's principal address	7 Willow Grove, Malvern, Worcestershire, WR14 2SE

### 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	Andrew Webb	Chairperson		Trustee Board
2	Barry Jones			
3	Stephen Goodenough			
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## Reference and Administrative details

(cont)

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	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	None
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

**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**

## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)



Full name Andrew Robert  
Webb

Position: Chairperson

Date: 4<sup>th</sup> August 2022

# EngageMalvern Accounts 2020-2021

This report covers the period from the end of October 2020 to the end of October 2021, i.e. a complete financial year. (EngageMalvern's annual accounting period ends on 30<sup>th</sup> October, as agreed with the Charity Commission and also accepted by HMRC.)

Currently, EngageMalvern's account exists in three parts, reflecting the major sub-divisions in its activities this year. These are as follows.

- a) 'Malvern Festival of Ideas (MFI) 2021'.
- b) 'EngageMalvern Truly Affordable Housing' project. This started in Mid-March 2020 with a substantial government-sourced grant, and had to be accounted separately at the sponsor's request. The duration of the project was one year; so it is finished now.
- c) 'EngageMalvern Other' - covering all other activities in support of the local and surrounding communities.

The financial activity on these accounts is summarised as follows.

## 1. Malvern Festival of Ideas 2021

Gift-aid tax return on 6 <sup>th</sup> November 2020 for the previous year's donations	1,277.87
Income from ticket sales	3,643.90
Donations	2,490.06
Transfer from EM Other account	1,000.00
<b>Total income</b>	<b>8,411.83</b>
<hr/>	
Expenditure for MFI 2021 (£)	-8,411.83
Retrospective reimbursement of Andrew Webb for some of the costs of MFI 2020	-534.20
<b>Total expenditure</b>	<b>-8,946.03</b>
<hr/>	
<b>Current balance</b>	<b>-534.20</b> (i.e. a deficit)

### Notes:

- a) Only one donation here is gift-aided and qualifies for an expected tax return next financial year of £597.52 (at 25%). This will take care of the above deficit with a bit left over for next year's Festival of Ideas.
- b) We had aimed for zero current balance, but the treasurer failed to allow for the retrospective reimbursement for last year's (2020) Festival of Ideas in trying to arrange that. The deficit of £534.20 is more than covered by total funds in the EM bank account; so, it does not appear as a deficit at the bank.

- c) As usual, the financial viability of the Festival is heavily dependent on the generosity of a couple of (anonymous) donors - for which we are very grateful indeed. But in future we should aim for those who benefit from the Festival to cover the entire cost.
- d) Exceptionally, EngageMalvern did not seek a grant from Malvern Hills District Council this year, as the Festival had to be held on-line because of the Covid-19 pandemic.

## 2. EngageMalvern Truly Affordable Housing Project

<b>Total income</b> - by transfer of unspent grant on 30 <sup>th</sup> October 2020 (£)	<b>4,760.40</b>
Services from 'Community First'	-2,030.00
Publicity	-1,300.00
Legal expenses	-1,620.00
Maps	-44.07
<b>Total expenditure</b>	<b>-4,994.07</b>
<b>Current balance</b>	<b>-233.67</b> (i.e. a deficit)

### Notes:

- a) The project is now completed and a little overspent - with the permission of two of the EM trustees. (That overspend was not recoverable from the sponsor.)
- b) An anonymous donation of £2,000 to the 'EM Other' account was intended in part to support this project at the trustees' discretion (see later). They will need to come to a decision on formally covering the above deficit and reducing the balance to zero.

### 3. EngageMalvern Other

Income by transfer from the previous FY (£)	1,086.22
Private (anonymous) donation	2,000.00
Grant from Malvern Civic Society	200.00
Donation from AmazonSmile	5.00
<b>Total income</b>	<b>3,291.22</b>
Membership fee for National CLT Network CIO	-75.00
Transfer to MFI 2021 account	-1,000.00
Membership fee for Hereford & Worcester Chamber of Commerce	-228.00
<b>Total expenditure</b>	<b>-1,303.00</b>
<b>Current balance</b>	<b>1,988.22</b>

#### Notes:

- a) The anonymous donation of £2,000 is gift-aided and should allow EM to claim £500.00 as tax return (at 25%) from HMRC at the end of this financial year (30<sup>th</sup> October 2021).
- b) It was intended by the donor that this donation be used to support different activities within EM at the discretion of the trustees. That could include the Malvern Festival of Ideas and the Truly Affordable Housing project or any extension/continuation of it.
- c) The £5.00 from the AmazonSmile scheme is our first donation from it.

#### Final notes:

- a) The above three balances total £1220.35 which agrees exactly with the balance currently held in EM's account at the Co-operative Bank. There are no outstanding disbursements or contributions in the pipeline - apart from an expected total gift-aid tax return of £1097.52.
- b) Since the resignation of David Tweats from EM we have had to remove his name from the list of possible signatories for issued cheques - and also add Barry Jones as a new signatory.

**ENGAGEMALVERN**

England & Wales - Charity number 1175088

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# Accounts

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# Trustees' annual report for the period



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

Period start date 

3	1	1	0	1	9
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 Period end date 

3	1	1	0	2	0
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Charity name 

EngageMalvern					
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 Charity No (if any) 

1	1	7	5	0	8	8
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## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The objectives of EngageMalvern (EM) are: i) To develop the capacity and skills of the members of the socially disadvantaged communities of Malvern and its surrounding villages in such a way they are able to identify and help meet their needs and to participate more fully in society. ii) The advancement of education for the public benefit in Malvern and surrounding villages in South Worcestershire and North Herefordshire in the areas of citizenship, science, religion, philosophy and ethics.
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	Regarding its first objective, (EM) made significant progress with its long-term project to build 'Truly Affordable Houses' for the under 35's and over 65's, age groups that are largely neglected in current housing developments. An application for a grant of £10000 from Groundwork UK to progress the project was successful, and the monies were received in March 2020. Following this, a project team was set up, which has met monthly from April 2020. EM has supported and sponsored the training of an individual on a community organising, course run by Citizens UK. Regarding the Community-led transport project, Trustees held a further rural transport workshop and contributed to the ongoing District Council project called 'Ticket to Ride'. Ideas from the project will be incorporated into any housing developments that may be sponsored by EngageMalvern and interest was maintained in a proposed project to develop Transport hubs being supported by Midlands Connect and Lincoln University. Regarding its educational objective for the benefit of the community, EngageMalvern ran a very successful and well attended weekend event (March 3 <sup>rd</sup> -6 <sup>th</sup> 2020), The Malvern Festival of ideas,

		on the theme of 'A Brave New World'. Unfortunately, two planned debates on 'a Fairer Tax System?' and 'Can we build more beautiful Houses?', had to be cancelled due to the Covid-19 pandemic.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have regard to the guidance issued by the Charities Commission on public benefit.

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	Volunteers have assisted with the delivery and organisation of the Malvern Festival of Ideas. In addition, volunteers from many different areas of expertise in the community-led housing sector have joined or have contributed to both the Housing and Transport project teams.
Other		

## Achievements and Performance

	SORP reference	
<p>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.</p>	<p>Para 1.20</p>	<p>Objective i) Community based projects</p> <p>a) Housing</p> <p>The intention is to develop one or more truly affordable (rents 40-60% of commercial rates), community-led housing developments in the local area for young people in training/apprenticeships in a bid to help local businesses attract and retain staff, as well as for people 65 and over who are wanting to downsize and live in a thriving intergenerational community. It is intended that these homes will be carbon-neutral, built to a high enduring standard and use sustainable energy sources. For the older community, assistive technology will be incorporated. In the period covered by this report, Trustees brought together a Housing Project Team, which included members of the local District Councils (Malvern Hills and Wychavon); representatives from the organization Community First (who provided paid expertise and administrative services); a former architect; a member of the Malvern Hills Community Land Trust; and other experts on a meeting-by-meeting basis. The group was tasked with identifying potential land sites for development, developing specifications for housing units; increasing knowledge of what is required to set up Community Land Trusts, and carrying out surveys to gain evidence of community need in the Malvern area. Also contacts were sought with employers to identify the housing needs of their younger staff, with the Citizens Advice organisation to understand the housing needs they were identifying locally and with other groups with an interest in this sector.</p> <p>b) Rural Transport project</p> <p>A further workshop of the A to B in Malvern 2040 project group had been held on 24<sup>th</sup> February 2020. This discussed further ideas on three areas, i) Busses, e-bikes and e-scooters ii) Optimising local travel by car and van (a response to withdrawal of some local bus routes) and an integrated transport plan. EngageMalvern had also contributed to a report by Lincoln University for Midlands Connect on rural transport solutions. In addition two Trustees had contributed to the Malvern Hills District Council initiative called 'Ticket to Ride' also looking for novel solutions to local transport in the light of continuing budget cuts by Government.</p>

		<p>Objective ii):</p> <p>EM ran a very successful long weekend event in 3<sup>rd</sup>-5<sup>th</sup> March 2020 called the Malvern Festival of Ideas on the theme of 'A Brave New World'. Despite concerns about the emerging pandemic, there were about 2500 bookings, although not everyone who made a booking actually attended. The opening speaker was Professor Sir Colin Blakemore who talked about the Past, Present and Future of the Human Brain. The presence of Professor Blakemore at the Festival caused some local interest and controversy due to his former research topics. Other speakers included Professor Baroness Ruth Lister who presented a talk entitled 'Towards a Good Society'; Julian Baggini made a presentation entitled 'How the World Thinks' and Peter Tatchell discussed 'What is next for LGBT+ rights'.</p> <p>An Arts and Science programme, called 'Making a Difference', aimed at younger people, was run in parallel at a different venue. This included an interactive series of story-telling sessions, run by Bernadette Russell; sessions on 'How Mathematics can save the whale' and 'How Mathematics can clean up ocean pollution' run by Professor Chris Budd.</p>
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### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Achievements against objectives set	Para 1.41	<p>The community-led projects for transport and housing are long-term, but good progress has been made to get these up and running.</p> <p>The feedback from the public, for the three educational events, was highly favorable and the events were deemed to meet the objective of advancing the education of the local community in the areas of citizenship, science, religion, philosophy and ethics.</p>

Performance of fundraising activities against objectives set	Para 1.41	Fund-raising for the Malvern Festival of Ideas was achieved through individual donations, ticket sales and a small grant from the Malvern Town Council. In addition, a grant application to the Government Groundwork UK Scheme was successful. These helped Engage Malvern to make progress against its objectives for the year.
Investment performance against objectives	Para 1.41	No investments
Other		

## Financial Review

	SORP reference	
Review of the charity's financial position at the end of the period	Para 1.21	The carry-over from the previous financial year was £1,500. The total income for this financial year was £7,685. The total expenditure was £7,829. This left a balance (credit) of £1,356 which was intended to support the charities objectives in the following financial year. Tax return on gift-aided donations was not claimed until after the end of this financial year. (Eventually, HMRC returned £1,353 - additional to the balance noted above.)
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	EngageMalvern currently does not have a policy of building up reserves to support future activities. It aims to at least balance books at the end of a financial year. Any surplus is already earmarked for the next year's activities and is too small to be considered a proper reserve.
Amount of reserves held	Para 1.22	Beyond the credit of £1,356 noted above (and the expected gift-aid tax return), none.
Reasons for holding zero reserves	Para 1.22	A policy for holding reserves has not been considered yet. Realistically, the current level of income above expenditure does not allow it.
Details of fund materially in deficit	Para 1.24	The charity is not in financial deficit
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	There are no current uncertainties about the charity as a going concern

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
The charity's principal sources of funds (including any fundraising)	Para 1.47	This year, funding was by voluntary donations (some gift-aided), a single local government grant and sales of tickets for some organised events under the 'Malvern Festival of Ideas' initiative. EngageMalvern was active in seeking further grants and other support to expand all its activities.
Investment policy and objectives including any social investment policy adopted	Para 1.46	Not applicable.
A description of the principal risks facing the charity	Para 1.46	The charity faced some risks to events due to the pandemic, which caused the cancellation of the public debates it supports. Planning to alleviate these problems for the 2021 Malvern Festival of

		Ideas, involve making this an online event. The current number of Trustees is low and a recruitment drive is planned.
Other		

## Structure, Governance and Management

Description of charity's trusts:	SORP reference	
Type of governing document (trust deed, royal charter)	Para 1.25	Founding constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	Trustees are appointed by the Trustee Board and these appointments are announced at the following AGM.

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policies and procedures adopted for the induction and training of trustees	Para 1.51	None at present, Trustees are directed to the Charity Commission guidance.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	EngageMalvern has a board of Trustees and a subgroup charged with fund-raising and to develop community-led projects. As below it is actively seeking alliances with like-minded organisations and is working with a wide range of Local Authorities, Business networks, including the local Chamber of Commerce, the Church of England, as well as experts in transport and housing.
Relationship with any related parties	Para 1.51	The Trustees seek to form alliances with other like-minded bodies and Institutions to help it meet its objectives. Lansdowne Crescent Methodist Church and the charity 'Malvern Welcomes', are alliance partners. Discussions have begun with the Malvern Civic Society to be a new alliance partner and projects in common are being sought. EngageMalvern is also working on several projects with representatives of the local District Councils.
Other		

## Reference and Administrative details

Charity name	EngageMalvern
Other name the charity uses	-
Registered charity number	1175088
Charity's principal address	3 Macaulay Rise, Malvern, Worcestershire, WR14 2UN

### 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	David John Tweats	Chairperson/Acting Secretary		Trustee Board
2	Andrew Robert Webb			
3	Barry Edward Jones			
4	Lynne Sparkes			
5	Ruth Forecast		Until 12th February 2020	
6	Eoin McCarthy		Until March 3 <sup>rd</sup> 2020	
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

## Reference and Administrative details

(cont)

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	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	None
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

### 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

## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)



Full name David John Tweats

Position: Acting Secretary

Date: March 2021



## Receipts and payments accounts

For the period from	Period start date 31/10/2019	To	Period end date 30/10/2020
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £
<b>A1 Receipts</b>				
Malvern Festival of Ideas 2020, LA Grant	-	500	-	500
MFI 2020, cash donations	-	2,569	-	2,569
MFI 2020, cheque and direct transfer donations	-	3,377	-	3,377
MFI 2020, ticket sales	-	728	-	728
Affordable Housing project, Groundwork UK grant	-	9,965	-	9,965
Gift aid tax return from HMRC	-	1,353	-	1,353
<b>Sub total (Gross income for AR)</b>	-	18,492	-	18,492
<b>A2 Asset and investment sales, (see table).</b>				
	-	-	-	-
<b>Sub total</b>	-	-	-	-
<b>Total receipts</b>	-	18,492	-	18,492
<b>A3 Payments</b>				
Malvern Festival of Ideas 2020, costs reimbursement	-	8,073	-	8,073
Citizens UK training plus travelling expenses	-	425	-	425
Chamber of Commerce subscription	-	228	-	228
Newsletters	-	42	-	42
Miscellaneous expenses	-	30	-	30
Affordable Housing project, payments to Community First (partner)	-	3,745	-	3,745
Affordable Housing project, advertising	-	419	-	419
Affordable Housing project, questionnaire & distribution	-	1,041	-	1,041
<b>Sub total</b>	-	14,003	-	14,003
<b>A4 Asset and investment purchases, (see table)</b>				
	-	-	-	-
<b>Sub total</b>	-	-	-	-
<b>Total payments</b>	-	14,003	-	14,003
<b>Net of receipts/(payments)</b>	-	4,489	-	4,489
<b>A5 Transfers between funds</b>	-	-	-	-
<b>A6 Cash funds last year end</b>	-	1,356	-	1,356
<b>Cash funds this year end</b>	-	5,845	-	5,845

## Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £
<b>B1 Cash funds</b>	For EngageMalvern 'other activities'	-	
		-	
		-	-
	<b>Total cash funds</b>	<b>-</b>	<b>5,845</b>
	(agree balances with receipts and payments account(s))	OK	OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £
<b>B2 Other monetary assets</b>		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

Categories	Details	Fund to which asset belongs	Cost (optional)
<b>B3 Investment assets</b>			-
			-
			-
			-
			-

Categories	Details	Fund to which asset belongs	Cost (optional)
<b>B4 Assets retained for the charity's own use</b>			-
			-
			-
			-
			-
			-
			-
			-

Categories	Details	Fund to which liability relates	Amount due (optional)
<b>B5 Liabilities</b>			-
			-
			-
			-
			-

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name

**CC16a**



Last year  
to the nearest £

-
-
-
-
<b>7,685</b>

-
-

<b>7,685</b>
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-
-
-
-

<b>7,829</b>
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-
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<b>7,829</b>
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-	<b>144</b>
	-
	<b>1,500</b>
	<b>1,356</b>



**Endowment funds**  
to nearest £

-
-
-

OK

**Endowment funds**  
to nearest £

-
-
-
-
-
-

**Current value (optional)**

-
-
-
-
-

**Current value (optional)**

-
-
-
-
-
-
-
-
-

**When due (optional)**


**Date of approval**
