

# 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) 

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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	
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) 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,</p> <p>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>-5th 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	
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8				
9				
10				
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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



CHARITY COMMISSION  
FOR ENGLAND AND WALES

EngageMalvern

1175088

## Receipts and payments accounts

For the period from	Period start date	To	Period end date
	31/10/2019		30/10/2020

### 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>	-	5,845
	(agree balances with receipts and payments account(s))	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £
<b>B2 Other monetary assets</b>		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
<b>B3 Investment assets</b>			-
			-
			-
			-
			-
<b>B4 Assets retained for the charity's own use</b>			-
			-
			-
			-
			-
			-
			-
			-
			-
<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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-

<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)**

-
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**Current value  
(optional)**

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**When due  
(optional)**


**Date of  
approval**
