

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

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 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>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

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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	
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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)

Exemptions from disclosure

Reason for non-disclosure of key personnel details

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)

A handwritten signature in black ink that reads "A. Webb." with a period at the end.

Full name: Andrew Robert
Webb

Position: Acting Chairperson

Date: 15th August 2023