



CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

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").

Independent
examiner's statement

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.

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:

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

30th October 2024

Colin M. Reed, Treasurer

Introduction

This report covers the period from 31st October 2023 (the end of the last financial year (FY) for us) to 30th 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		
Total income:	28,093.90	Total expenditure:	27,593.90
Balance: £500.00 (to be carried over for MFI 2025)			

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
Total income: 25.00	Total expenditure: 25.00
Balance: £00.00	

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 22nd 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	
Total income: 1,178.98	Total expenditure: 00.00
Balance: £1,178.98	

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 30th 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

0	1	1	1	2	3
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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	
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) 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 & 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"> • 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; • a strong visual identity of the Festival though a refreshed logo and set of simple design
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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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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)

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: 13th August 2025