



Celebrating Norwich  
since 1923

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# ANNUAL REPORT

of the Trustees for  
Summer 2023 – Spring 2024

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PROMOTING HERITAGE; SHAPING TOMORROW

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# ANNUAL REPORT

## of the Trustees for Summer 2023 – Spring 2024

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### INTRODUCTION FROM THE CHAIR

It has been a great honour to take over as Chair of the Norwich Society, especially in its Centenary Year, and I would like to extend my thanks to Barry Howell – Barry held the fort for an extended 3-year term to guide the Society through the pandemic, and it is a tribute to him that the Society both maintained its level of membership and an active events calendar throughout that difficult period.

Our Centenary Year celebrations were a great success, and I would like to give my thanks to the whole Centenary Planning Group who put so much thought and effort into its planning and fruition:

- In September we held the Norwich 100 exhibition in the Forum, of 100 buildings and spaces which the Society has influenced through its history. Buildings saved even include the Assembly House where our AGM is taking place - in 1935 we successfully lobbied the Ancient Monuments Board to oppose its de-listing and so prevent its demolition. The success of the exhibition was demonstrated by the more than 50 new members who joined us there at the Forum after viewing the exhibition, and the almost 200 catalogues sold.
- Our Centenary plaque project remains ongoing where we will be fixing 8 commemorative plaques to buildings which members voted for as places of special interest.
- A special *Aspects of Norwich* was published charting the history of the Society, written by Vicki Manthorpe, our former administrator, and to whom I also give my thanks.
- The year culminated in our Centenary dinner at the Assembly House, where over 60 members enjoyed a splendid 3-course dinner and an enjoyable social occasion.

We continue to campaign for higher standards of new development. Last October we celebrated the bi-ennial Norfolk Design and Craftsmanship Awards DCA23, in collaboration with RIBA Norfolk and Norwich University of the Arts, and are already planning DCA25 to promote and celebrate high quality new design.

The pressures on our City are higher than ever before - much of the last few years was spent in seeking improvements to the Anglia Square proposals, and in coming years we will be equally engaged with the East Norwich Partnership, including Carrow Works, which is bringing forward proposals for more than 4000 homes.

However perhaps the greatest challenge of all is climate change, evidenced by the record-breaking heatwaves, flooding and gales we have already been subjected to. The Society is engaging with the City Council, its partners and other organisations to understand its impacts on our city and how these can be mitigated; we will be holding a special event next October focussing on the implications for local business and communities.

I would also like to thank Rachel Kirk, whose untiring efforts as our Chief Administrative Officer have ensured that both our centenary and regular events programmes are delivered so effectively; they are generally sold out well before the event – so if you are planning to attend be sure to book or you may be disappointed!

In these times of rapid change, the work of the Norwich Society is more needed than ever, and it is through your support, as our members, that we can keep campaigning both for the protection of our heritage and to encourage high standards of new development for the future. Please contact Rachel if you would like to join a Committee or working group, or volunteer to assist with our events, walks and other activities. With all your help we can look forward to another 100 active and successful years!

*Jon Boon, Chair*



## THE SOCIETY AND CHARITABLE OBJECTIVES

As the city's civic society, The Norwich Society is an independent community-based charity, supporting the preservation, development and improvement of features of historic interest in the city. It also uses the expertise of architects, town planners, surveyors and other industry professionals within its committees to comment on significant planning decisions in the area on behalf of the public. And it encourages exploration and enjoyment of Norwich's history through a range of talks, walks and other events, as well as regular publications.

From saving the historic Elm Hill area from demolition in the 1920s, to recent advocating for better development of the Anglia Square site, the Society has been championing the built environment and public spaces in Norwich and celebrating the city's unique character and beauty for nearly a century. The Society was founded in 1923 and registered as a Charitable Incorporated organisation (CIO) in May 2020 (registration number 1189593). It is primarily a voluntary organisation, but it also engages a contractor to provide administrative and support services.

### OUR CHARITABLE OBJECTIVES

#### **The Society has three key areas of work:**

- To encourage public interest in and care for the beauty, history and character of Norwich and its surroundings.
- To encourage the preservation, development and improvement of features of general public amenity or historic interest in Norwich and its surroundings.
- To encourage high standards of Architecture and Town Planning in Norwich and its surroundings.

### GOVERNANCE

The last AGM was held in-person on 25th April 2023.

The Society's governing constitution provides for the management of the Society to be in the hands of an Executive Committee, who are also the Trustees. The Executive Committee consists of four Officers – Chair, Vice-Chair, Honorary Treasurer and Honorary Secretary – and up to eight other members, to a maximum of twelve in total.

#### **Current Officers**

Chair - Jon boon

Vice Chair - David Taylor

Honorary Secretary - David Taylor

Honorary Treasurer - Neil Sturgeon

## Current Executive Members

Michael Jordan

Simeon Jackson (*standing down 2024*)

John Howkins

Alan Theobald

Karen Watling (*Standing 2024*)

Under the CIO Constitution all Executive Committee member roles are open for election at the AGM 2024 except for the Chair who is elected for two years..

The Society's Patron is Sir Richard Jewson and the President is the Right Worshipful the Lord Mayor of Norwich. These are both Honorary positions bestowed by the Executive Committee.

## ENCOURAGING THE PRESERVATION, DEVELOPMENT AND IMPROVEMENT OF FEATURES OF GENERAL PUBLIC AMENITY OR HISTORIC INTEREST IN NORWICH AND ITS SURROUNDINGS

### PARTNERSHIPS

The Norwich Society collaborates with a number of groups and has representatives in organisations with similar goals to effect positive change and champion the historic character of the city.

The Society's website provides more information and highlights the connections with organisations including Civic Voice, Norwich Preservation Trust, Norwich Heritage Alliance, River Wensum Strategy Partnership and Mousehold Heath Conservators amongst others.

### RIVERSIDE ACCESS

The Civic Environment Committee (CEC) has continued to work on its audit of the access to Norwich's two rivers, the Rivers Wensum and Yare, with sample surveys to test draft audit criteria.

The City Council's Local Plan maps show lengths of 'existing' and 'proposed' riverside walks and the project is examining the present condition of these and likely prospects for change as well as considering wider access to areas adjacent to the rivers.

### WEATHERVANES, CLOCKS & SUNDIALS

CEC has completed its survey and report on weathervanes, and revised 'Telling the time in Norwich', its survey of clocks and sundials.

Both are available from the Society's website.



The locations described in these reports were combined into a presentation shown as part of the Centenary exhibition, and now available on the Society's YouTube channel.

### PRESERVATION AND HERITAGE AT RISK

The Building Conservation Committee (BCC) (*formerly Conservation Development Committee*), has reviewed its remit and recruited new members including a new chair.

The Society is represented on the Heritage at Risk Group led by Norwich City Council which meets three times a year and reviews the situation of Norwich buildings listed on the Buildings at Risk Register.



The Society has continued its representation on the Norwich Preservation Trust (NPT) and has recently appointed two new representatives who will report back to the Executive Committee. This charity was formed in the 1960s as a joint venture between Norwich City Council and The Norwich Society with the primary purpose to preserve and restore historic buildings in the city. It regards itself as a 'restorer of last resort' and takes on commercially non-viable projects with properties owned by the City Council.

## ENCOURAGING HIGH STANDARDS OF ARCHITECTURE AND TOWN PLANNING IN NORWICH AND ITS SURROUNDINGS

### DESIGN AND CRAFTSMANSHIP AWARDS



The biennial **Design and Craftsmanship Awards** (DCA) Ceremony was held at the Assembly House in October, attended by 150 people from the local construction industry and their consultants. For the first time, Norwich Society and RIBA Norfolk were joined in the award scheme by Norwich University of the Arts.

Nearly 50 nominations spread over 5 building categories were judged, and the winners demonstrated the high quality of design and craftsmanship that can be achieved in Norwich and Norfolk. Winners included Digi-tech factory at City College, NUA's Duke Street Riverside building, and the new East Anglian Air Ambulance headquarters.

The Sir Bernard Feilden award for the best conservation project in Norwich was won by Ruth Brennan for Drayton Lodge, and presented for the last time by Lady Feilden, who is stepping down from that role. We would like to thank her for joining us at the ceremony and presenting the award over so many years, and look forward to their son taking on the mantle at future ceremonies.



A sustainability category was introduced for the first time, where the most sustainable project from all the categories was selected; the winner was Mutton's Mill in Halvergate.

Mary Ash, who has been the Norwich Society representative on the DCA steering group since its inception, is stepping down this year, and we would like to thank her for all her hard work and valuable assistance in helping to deliver the awards. If you would be interested in joining the steering group for DCA25, please contact Rachel to express your interest.

*A video presentation can be found on the Society's website.*

### STRATEGIC PLANS FOR GREATER NORWICH

The Society's Strategic Planning and Transport Committee (SP&T) has continued to monitor the emerging **Greater Norwich Local Plan** which has now passed through its public examination and has been adopted by Norwich City Council and its partner authorities.

The Plan sets out the scale and location of permissible development over the next two decades, therefore its adoption will therefore provide at least some degree of certainty in what are increasingly uncertain times.

Nevertheless, calls for radical **planning reform** are once again on the agenda as the general election approaches. The Committee will be seeking to ensure that the consequences of these proposals are fully understood by all and that any reforms serve to enable rather than frustrate the sustainable development of this fine City.

In the last year, the Committee has continued to lead on the Society's response to the largest and most strategically important development proposals. We opposed the revised scheme at **Anglia Square** on the basis that it was "better but still not good enough" and were naturally disappointed when the City Council granted permission. The developer's recent decision to abandon the scheme has now thrown matters back into the melting pot. We will be keen to play our part in what we hope will be a radical rethink about the potential that Anglia Square still holds.

In the last year, progress on a new masterplan for **East Norwich** has been delayed and there is a continuing risk that the potential for a fully integrated new community here will not be realised. For that reason, we have opposed plans which would develop **Carrow Works** in isolation from its neighbours and will be monitoring future developments closely.

## TRANSPORT, TRAFFIC AND HIGHWAYS ISSUES

SP&T continues to respond to the highways and transport projects that are being promoted and implemented in Norwich by Norfolk County Council. We remain concerned that the Government's competitive bidding process is

encouraging the generation of County projects within Norwich that are piecemeal, disjointed, disruptive and often of only marginal benefit to road and pavement users. At times these schemes can even generate new safety concerns. In the last year we have been particularly critical of the Heartsease roundabout proposals and have been looking to see the scheme reviewed in its entirety. We have not succeeded in achieving this but will continue to campaign for improvements.

## PLANNING RESPONSES

There has been a number of significant applications during the year for which the Planning Appraisal Committee (PAC) has provided comprehensive responses to the Planning Department; these included Angel Yard housing cooperative (now approved), 55no. dwellings on King Street, next to Dragon Hall, and a new development at St George's Works, comprising over 50 three-storey homes and 2,500m<sup>2</sup> of retail and office space.

There is a constant pressure from new applications to build higher, and care needs to be taken to ensure that taller buildings remain appropriate in their context and in scale with their neighbours. The re-development of Debenhams, for example, for which the Committee has recently submitted its consultation response, replaces the existing monolithic 5-storey block with a variegated roof form rising up to 8 storeys. A future application, currently under public consultation, is the Hotel Nelson, where again a significant height increase is being proposed.



As we mentioned in last year's report, Norwich is located within the Yare catchment area where, due to its high levels of nitrates and phosphates, Natural England's Nutrient Neutrality regulations have halted all new-build residential planning applications since March 2022; the impact of this has been evident to the Committee through the absence of applications for new homes again during the year.

The East Norwich masterplan is developing proposals for Carrow Works, Deal Ground and the Utilities site, which together could provide about 3,600 new homes and 4,000 new jobs. For very large projects such as these, PAC works with the SP&T Committee to help reconcile the wider policy implications with specific building issues – an example is Trowse Pumping Station where its future use is dependent on the development proposals surrounding it, but in the meantime has become prone to vandalism and suffered a serious fire.



Our regular quarterly meetings with the Head of Norwich Planning and other officers have continued, and have widened in scope to include issues such as conservation and green spaces.

This year saw the retirement from the Committee of Paul King, a long-serving member with a wide knowledge of the buildings in Norwich and their history. We thank him for all his advice over the years, which will be missed.

So another varied and challenging year for the Committee, and my annual thanks to our hard-working Committee members who give up their valuable time to help guide the future of our City.

## ENCOURAGING PUBLIC INTEREST IN AND CARE FOR THE BEAUTY, HISTORY AND CHARACTER OF NORWICH AND ITS SURROUNDINGS

### TALKS AND EVENTS

The 100<sup>th</sup> anniversary celebrations were launched on Bishop Bridge on 23<sup>rd</sup> March 2023 followed by a reception in The Great Hospital.



It has been a particularly busy year, with a full and varied events programme to celebrate the centenary including **Visits** to Clifton House, Kings Lynn and Hoveton Hall.



The year's **Talks Series** covered a wide range of topics:

- Treasures of Norwich Cathedral
- Alexander Neville
- Norfolk Survivors of the Titanic
- Jenny Lind
- Kett's Rebellion
- William of Norwich
- Norwich 1945-1960
- The Remarkable Life of Thomas Fowell Buxton
- The ups and Downs of Elm Hill, c.1450-2023
- The Days of The Norwich Trams
- Manifestations of Madness at the Norfolk Asylum

- *1923 and All That* started at Bishop Bridge and ended up at the Assembly House highlighting the achievements of the Society over 100 years..
- Tombland and the Riverside Walk
- Life and Commerce of the Riverside and Port of Norwich
- Charing Cross to St Andrew's Plain
- Elm Hill
- The Complete Lanes
- Black Tower & Walls
- Prince of Wales Road

The EDP and Norfolk Magazine published a **Quiz** created by Jonathon Hooton ***'How much do you know about historic Norwich?'*** inviting readers to *'Celebrate the centenary of the Norwich Society . . . the group which has been championing the city's heritage for 100 years.'*



In January 2024 The Assembly House hosted **The Norwich Society Centenary Dinner**

Thanks to Norwich City Guides we delivered twelve **Centenary Walks**.

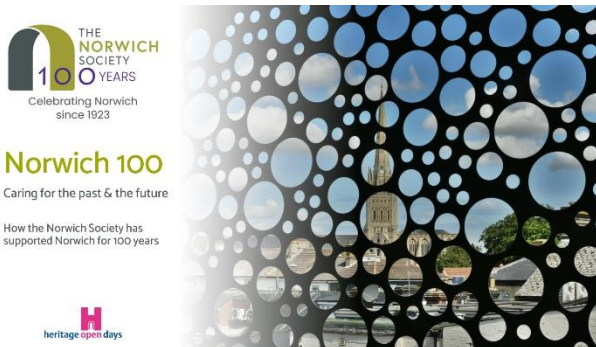




## Norwich 100

### Caring for the past & the future

The main event of the centenary year was a photographic exhibition in The Forum during the Heritage Open Days week in September 2023.



The exhibition was incredibly successful, far more so than we had anticipated. 32,395 people visited The Forum during our exhibition, all of whom would have been aware of the display and many of whom spent a long time looking at the photos and reading the captions.

We gained over 50 new members and sold lots of publications.



A **Norwich 100 Trail** encouraged visitors to explore the City and Norwich Residents were asked to name their favourite Norwich places.



A **Norwich 100 slideshow** including all 100 photographs and captions and Peoples' Choice is available for everybody to enjoy on the Society's YouTube channel.

The Society also published an **Exhibition Catalogue** supporting the Norwich 100 exhibition.



### THANK YOU

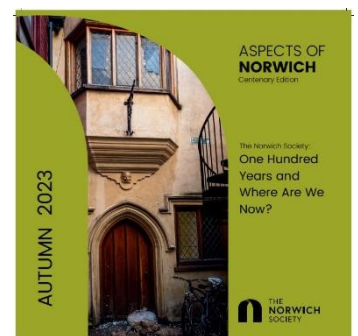
**Norwich 100** could not have taken place without the support of the **Forum Trust** who hosted our centenary exhibition, and the **Forum Team** and who went that extra mile to help us make it such a success.

Many thanks to our photographer **Fred Dustin**, who worked tirelessly to get the right shots for our exhibition and sadly died in September 2023. He will be greatly missed.



### PUBLICATIONS

The Society's Publications Working Group (PWG) has continued to publish its twice-annual *Aspects of Norwich* book which includes illustrated articles across a variety of topics about Norwich's history and the influences making today's city. In Autumn 2023 the Society published a *Centenary Edition of Aspects of Norwich*.



## SOCIAL MEDIA

The Society's social media presence continues to grow. As of April 2023, the Norwich Society Facebook page (@TheNorwichSociety) had 7,200 followers, and the Twitter account (@NorwichSociety), had over 1,300 followers. Social media is now an established tool in communicating the Society's events and updates as well as providing a channel to inspire the public with our passion for Norwich.

## YouTube

The Norwich Society's YouTube channel hosts videos about the city's history including talks from speakers who gave live talks in The Forum and have kindly recorded their talks so we can upload them to YouTube, and ensure that those who were unable to attend In person won't miss out. As of April 2024, the Society's YouTube channel had over 490 subscribers and over 21,000 views.

## MEMBERSHIP

Member subscriptions are the main source of revenue for the Society. Due to increased running costs subscription charges were raised in January 2024.

On 1/4/2024 there were 827 individual members. The previous years membership totals were: (741 in 2022, 732 in 2021, and 745 in 2020). The significant increase in 2024 was as a direct result of the Norwich 100 exhibition in September 2023.

Joining the Society using the website's on-line portal is the predominant method of membership subscription..

## SPONSORSHIP AND BUSINESS SUPPORT

The Society is currently supported by 20 businesses and groups.

**The Society would like to thank its business and group members for their ongoing support.**

In 2022 the Society introduced Business Patronage as a new level of membership designed to demonstrate a significant further commitment to the work of the Society. IDS systems was the first Business Patron and continues to support us.



**The Trustees would also like to extend a special thank you to Larking Gowen** for their generosity in providing the Society with Postage administration and costs for our membership mailings.

## FINANCE

### Year ended 31 December 2023

The Society's total income from General activities for the year ended 31 December 2023 was £28,763 compared to £26,304 in 2022, an increase of £2,459. This increase was mainly as a result of higher income from both publications and events.

The majority of the Society's income continued to be in the form of membership fees - total membership income for the year was £16,069 compared to £15,745 in 2022.

General costs for 2023 totalled £47,088 compared to £26,031 in 2022 - an increase of approximately £21,000. About £10,000 of this increase related to the development and improvement of the Society's website and on-line systems, which was a much-needed investment for both now and the future. Most of the remaining £11,000 increase in costs related to publications and events, with the additional income received from these sources being more than the additional costs.

Gift Aid reclaims continue to be an important source of income for the Society. The Gift Aid claim for 2023 amounted to £2,515, and this has been received from HMRC in 2024.

Overall, the Society incurred a deficit of £18,325 in 2023 on General activities compared to a surplus of £273 in 2022.

Whilst disappointing, the deficit was expected and largely reflected an under-investment in the Society's IT and website in recent years, together with costs relating to the centenary celebrations. The expectation is that the Society will not have any similar one-off costs in 2024.

Such a large deficit is clearly not sustainable. We are therefore budgeting for the Society to break-even in 2024, with this expected to be achieved by higher income from subscriptions, events and publications arising in part from increased awareness of the Society's activities thanks to the Centenary celebrations.

At 31 December 2023, the Society's total reserves amounted to £41,592. This included cash at bank of £39,978 compared to £56,071 at 31 December 2022.

The Executive Committee produced a Financial Reserves Policy in 2023.

## ADMINISTRATION

The Society has an office in St Martin at Palace Church, the administration centre for the Norwich Historic Churches Trust.

The Chief Administrative Officer, Rachel Kirk manages the day-to-day operations and provides administrative support to the Trustees and committees. Rachel works predominantly from home but can be available to speak to in person at the office upon appointment.

## CONTACT US

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07503 951195

[www.thenorwichsociety.org.uk](http://www.thenorwichsociety.org.uk)

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The Norwich Society is a Charitable Incorporated organisation (CIO), registration number 1189593







THE NORWICH SOCIETY CIO			Charity No (if any)	1189593	CC17a
Annual accounts for the period					
Period start date	1/1/2023	To	Period end date	12/31/2023	

## Section A Statement of financial activities

Recommended categories by activity	Details of own analysis	Note	Unrestricted funds £	Restricted income funds £	Endowment funds £	Total this year £	Total last year £
			F01	F02	F03	F04	F05
<b>Incoming resources (Note 3)</b>							
<b>Incoming resources from generated funds</b>			-	-	-	-	-
Voluntary income		S01	4,991	4,052	-	9,043	7,829
Activities for generating funds		S02	22,851	2,280	-	25,131	18,267
Investment income		S03	921	-	-	921	208
<b>Incoming resources from charitable activities</b>		S04	-	-	-	-	-
<b>Other incoming resources</b>		S05	-	5,000	-	5,000	-
<b>Total incoming resources</b>		S06	28,763	11,332	-	40,095	26,304
<b>Resources expended (Notes 4-8)</b>							
<b>Costs of Generating Funds</b>			-	-	-	-	-
Costs of generating voluntary income		S07	584	-	-	584	180
Fundraising trading costs		S08	-	-	-	-	-
Investment management costs		S09	-	-	-	-	-
<b>Charitable activities</b>		S10	8,827	1,457	-	10,284	2,932
<b>Governance costs</b>		S11	228	-	-	228	252
<b>Other resources expended</b>		S12	37,449	6,746	-	44,195	22,667
<b>Total resources expended</b>		S13	47,088	8,203	-	55,291	26,031
<b>Net incoming/(outgoing) resources before transfers</b>		S14	- 18,325	3,129	-	- 15,196	273
<b>Gross transfers between funds</b>		S15	-	-	-	-	-
<b>Net incoming/(outgoing) resources before other recognised gains/(losses)</b>		S16	- 18,325	3,129	-	- 15,196	273
<b>Other recognised gains/(losses)</b>							
Gains and losses on revaluation of fixed assets for the charity's own use		S17	-	-	-	-	-
Gains and losses on investment assets		S18	-	-	-	-	-
<b>Net movement in funds</b>		S19	- 18,325	3,129	-	- 15,196	273
<b>Total funds brought forward</b>		S20	56,788	-	-	56,788	56,515
<b>Total funds carried forward</b>		S21	38,463	3,129	-	41,592	56,788

## Section B Balance sheet

	Note	Restricted			Total this year £	Total last year £
		Unrestricted funds	income funds	Endowment funds		
		£	£	£		
		F01	F02	F03	F04	F05
<b>Fixed assets</b>						
Tangible assets (Note 9)	B01	-	-	-	-	-
	B02	-	-	-	-	-
Investments (Note 10)	B03	-	-	-	-	-
<b>Total fixed assets</b>	B04	-	-	-	-	-
<b>Current assets</b>						
Stock and work in progress	B05	-	-	-	-	-
Debtors (Note 11)	B06	3,793	-	-	3,793	2,196
(Short term) investments	B07	-	-	-	-	-
Cash at bank and in hand	B08	36,849	3,129	-	39,978	56,070
<b>Total current assets</b>	B09	40,642	3,129	-	43,771	58,266
<b>Creditors: amounts falling due within one year</b> (Note 12)	B10	2,179	-	-	2,179	1,478
<b>Net current assets/(liabilities)</b>	B11	38,463	3,129	-	41,592	56,788
<b>Total assets less current liabilities</b>	B12	38,463	3,129	-	41,592	56,788
<b>Creditors: amounts falling due after one year</b> (Note 12)	B13	-	-	-	-	-
<b>Provisions for liabilities and charges</b>	B14	-	-	-	-	-
<b>Net assets</b>	B15	38,463	3,129	-	41,592	56,788
<b>Funds of the Charity</b>						
Unrestricted funds	B16	38,463			38,463	56,788
	B17	-			-	-
Restricted income funds (Note 13)	B18		3,129		3,129	-
Endowment funds (Note 13)	B19			-	-	-
<b>Total funds</b>	B20	38,463	3,129	-	41,592	56,788

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

Signature	Print Name	Date of approval
J Boon	Jon Boon	4/30/2024
N Sturgeon	Neil Sturgeon	4/30/2024

**Section C****Notes to the accounts****Note 1 Basis of preparation**

***This section should be completed by all charities.***

**1.1 Basis of accounting**

These accounts have been prepared on the basis of historic cost (except that investments are shown at market value) in accordance with:

- Accounting and Reporting by Charities – Statement of Recommended Practice (SORP 2005);
- and with\* 

✓

 Accounting Standards;
- or
- and with the Charities Act.

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\* -Tick as appropriate:

- if all relevant disclosures shown in the pack have been given then please tick "Accounting Standards";
- if disclosures completed in these accounts have been restricted to those required by the FRSE, then please tick "Financial Reporting Standards for Smaller Enterprises (FRSE)".

\*\* - If no departures from the chosen standards have been made then delete these words; otherwise give details of any changes in the boxes.

**1.2 Change in basis of accounting**

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

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§ if no changes have been made to accounting policies then delete these words.

**1.3 Changes to previous accounts**

No changes have been made to accounts for previous years.

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§§ if no changes have been made to accounts for previous periods then delete these words.

**Note 2 Accounting policies**

*This standard list of accounting policies has been applied by the charity except for those deleted. Where a different or additional policy has been adopted then this is detailed in the box below.*

**INCOMING RESOURCES**

<b>Recognition of incoming resources</b>	These are included in the Statement of Financial Activities (SoFA) when: <ul style="list-style-type: none"> <li>the charity becomes entitled to the resources;</li> <li>the trustees are virtually certain they will receive the resources; and</li> <li>the monetary value can be measured with sufficient reliability.</li> </ul>
<b>Incoming resources with related expenditure</b>	Where incoming resources have related expenditure (as with fundraising or contract income) the incoming resources and related expenditure are reported gross in the SoFA.
<b>Grants and donations</b>	Grants and donations are only included in the SoFA when the charity has unconditional entitlement to the resources.
<b>Tax reclaims on donations and gifts</b>	Incoming resources from tax reclaims are included in the SoFA at the same time as the gift to which they relate.
<b>Contractual income and performance related grants</b>	This is only included in the SoFA once the related goods or services have been delivered.
<b>Gifts in kind</b>	Gifts in kind are accounted for at a reasonable estimate of their value to the charity or the amount actually realised.  Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.  Gifts in kind for use by the charity are included in the SoFA as incoming resources when receivable.
<b>Donated services and facilities</b>	These are only included in incoming resources (with an equivalent amount in resources expended) where the benefit to the charity is reasonably quantifiable, measurable and material. The value placed on these resources is the estimated value to the charity of the service or facility received.
<b>Volunteer help</b>	The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.
<b>Investment income</b>	This is included in the accounts when receivable.
<b>Investment gains and losses</b>	This includes any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.

**EXPENDITURE AND LIABILITIES**

<b>Liability recognition</b>	Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.
<b>Governance costs</b>	Include costs of the preparation and examination of statutory accounts, the costs of trustee meetings and cost of any legal advice to trustees on governance or constitutional matters.
<b>Grants with performance conditions</b>	Where the charity gives a grant with conditions for its payment being a specific level of service or output to be provided, such grants are only recognised in the SoFA once the recipient of the grant has provided the specified service or output.
<b>Grants payable without performance conditions</b>	These are only recognised in the accounts when a commitment has been made and there are no conditions to be met relating to the grant which remain in the control of the charity.
<b>Support Costs</b>	Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources, eg allocating property costs by floor areas, or per capita, staff costs by the time spent and other costs by their usage.

**ASSETS**

<b>Tangible fixed assets for use by charity</b>	These are capitalised if they can be used for more than one year, and cost at least £500. They are valued at cost or a reasonable value on receipt.
<b>Investments</b>	Investments quoted on a recognised stock exchange are valued at market value at the year end. Other investment assets are included at trustees' best estimate of market value.
<b>Stocks and work in progress</b>	These are valued at the lower of cost or market value.

**POLICIES ADOPTED  
ADDITIONAL TO OR  
DIFFERENT FROM THOSE  
ABOVE**



**Note 3 Analysis of incoming resources**

*Incoming resources may be further analysed if this would help the reader of the accounts.*

	Analysis	This year £	Last year £
<b>Voluntary income</b>	Donations and gifts	6,528	4,206
	Gift Aid	2,515	1,692
	Legacies	-	1,931
		-	-
		-	-
	<b>Total</b>	<b>9,043</b>	<b>7,829</b>
<b>Activities for generating funds</b>	Subscriptions	16,069	15,745
	Publications	3,450	726
	Events	5,612	1,796
		-	-
		-	-
	<b>Total</b>	<b>25,131</b>	<b>18,267</b>
<b>Investment income</b>	Interest income	921	208
		-	-
		-	-
		-	-
		-	-
	<b>Total</b>	<b>921</b>	<b>208</b>
<b>Incoming resources from charitable activities</b>		-	-
		-	-
		-	-
		-	-
		-	-
	<b>Total</b>	<b>-</b>	<b>-</b>

<b>Section C</b>	<b>Notes to the accounts</b>	<b>(cont)</b>
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**Note 4                      Analysis of resources expended**

Resources expended may be further analysed if this would help the reader of the accounts.

	Analysis	This year £	Last year £
<b>Costs of generating voluntary income</b>	Advertising and promotion	584	180
		-	-
		-	-
		-	-
		-	-
	<b>Total</b>	584	180
<b>Fundraising trading costs</b>		-	-
		-	-
		-	-
		-	-
		-	-
	<b>Total</b>	-	-
<b>Investment management costs</b>		-	-
		-	-
		-	-
	<b>Total</b>	-	-
<b>Charitable activities</b>	Publications	5,954	1,994
	Events	4,330	938
		-	-
		-	-
		-	-
	<b>Total</b>	10,284	2,932
<b>Governance costs</b>	AGM costs	228	252
		-	-
		-	-
	<b>Total</b>	228	252

**Section C****Notes to the accounts****(cont)****Note 5 Support Costs**

*Please complete this note if the charity has analysed its expenses using activity categories and has support costs.*

Support cost type	Fundraising activity £	Charitable Activity £	Governance Activity £	Total Cost £
Office costs	-	1,071	-	1,071
Printing, postage etc		949		
Co-ordinator costs		25,331		
Rent		2,640		
Telephone and internet		946		
Independent examiner	-	-	200	200
Subscriptions	-	544	-	544
Website costs	-	9,784	-	9,784
Society projects	-	2,730	-	2,730
	-	-	-	-
	-	-	-	-
<b>Total</b>	-	43,995	200	44,195

**Note 6 Details of certain items of expenditure****6.1 Trustee expenses**

*Please provide details of the amount of any payment or reimbursement of out-of-pocket expenses made to trustees or to third parties for expenses incurred by trustees. If no expenses were paid, please enter 'None' in the appropriate box(es).*

Number of trustees who were paid expenses

Nature of the expenses

Total amount paid

This year	Last year
None	None
None	None

**6.2 Fees for examination or audit of the accounts**

*Please provide details of the amount paid for any statutory external scrutiny of accounts and other services provided by your independent examiner or auditor. If nothing was paid please enter NONE in the appropriate box(es).*

Independent examiner's or auditors' fees for reporting on the accounts

Other fees (for example: advice, consultancy, accountancy services) paid to the independent examiner or auditor

This year £	Last year £
200	200
None	None

**(cont)**

## Paid employees

**Please complete this note if the charity has any employees.**

This year £	Last year £
-	-
-	-
-	-
-	-

This year Number	Last year Number
-	-
-	-
-	-
-	-
-	-

***Please complete if a defined contribution pension scheme is operated.***

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06/18/2024



**Section C****Notes to the accounts****(cont)****Note 8 Grantmaking**

*Please complete this note if the charity made any grants or donations which in aggregate form a material part of the charitable activities undertaken.*

**8.1 Total value of grants**

Purpose for which grants made	Grants to institutions Total amount £	Grants to individuals Total amount £
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-
<b>Total</b>	-	-

**8.1 Grantmaking costs**

*If the charity's accounts are prepared on the "activity basis" please give details of any support cost associated with grantmaking. Please enter "Nil" if the charity does not identify and/or allocate support costs.*

Support costs of grantmaking

£

**8.3 Grants made to institutions**

*If the charity has made grants to particular institutions that are material in the context of its grantmaking please give details of the institution supported, purpose of the grant and total paid to each institution listed. Sufficient information should be given to provide a reasonable understanding of the range of institutions supported.*

Names of institutions	Purpose	Total amount of grants paid £
		-
		-
		-
		-
		-
		-
		-
		-
		-
		-
		-
<b>Total grants to institutions</b>		-

**Note 9 Tangible fixed assets***Please complete this note if the charity has any tangible fixed assets***9.1 Cost or valuation**

	Freehold land & buildings	Other land & buildings	Plant, machinery and motor vehicles	Fixtures, fittings and equipment	Payments on account and assets under construction	Total
	£	£	£	£	£	£
Balance brought forward	-	-	-	314	-	314
Additions	-	-	-	-	-	-
Revaluations	-	-	-	-	-	-
Disposals	-	-	-	-	-	-
Transfers *	-	-	-	-	-	-
Balance carried forward	-	-	-	314	-	314

**9.2 Accumulated depreciation and impairment provisions**

<b>**Basis</b>	SL or RB	SL or RB	SL or RB	SL	SL or RB
<b>** Rate</b>				2 YEARS	

Balance brought forward	-	-	-	314	-	314
Depreciation charge for year	-	-	-	-	-	-
Impairment provisions	-	-	-	-	-	-
Revaluations	-	-	-	-	-	-
Disposals	-	-	-	-	-	-
Transfers*	-	-	-	-	-	-
Balance carried forward	-	-	-	314	-	314

**9.3 Net book value**

Brought forward	-	-	-	-	-	-
Carried forward	-	-	-	-	-	-

**9.4 Revaluation***If any fixed assets have been revalued please give details of the valuer and method of valuation*

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\* The "transfers" row is for movements between fixed asset categories.

\*\* Please indicate the method of depreciation by deleting the method not applicable (SL = straight line; RB = reducing balance). Also please indicate the rate of depreciation: for straight line, what is the anticipated life of the asset (in years); for reducing balance, what is the percentage annual deduction.

**Section C****Notes to the accounts****(cont)****Note 10 Investment assets***Please complete this note if the charity has any investment assets.***10.1 Fixed assets investments**

	£
Carrying (market) value at beginning of year	-
<b>Add:</b> additions to investments at cost	-
<b>Less:</b> disposals at carrying value	-
<b>Add/(deduct):</b> net gain/(loss) on revaluation	-
Carrying (market) value at end of year	-

*Please provide below:***10.2 A breakdown of the market values of investments shown above agreeing with the balance sheet row B03.****10.3 A breakdown of the income from investments agreeing with SOFA row S03.****Analysis of investments**

	<b>10.2 Market value at year end  £</b>	<b>10.3 Income from investments for the year  £</b>
<b>Investment properties</b>	-	-
<b>Investments listed on a recognised stock exchange or held in common investment funds, open ended investment companies, unit trusts or other collective investment schemes</b>	-	-
<b>Investments in subsidiary or connected undertakings and companies</b>	-	-
<b>Securities not listed on a recognised Stock Exchange</b>	-	-
<b>Cash held as part of the investment portfolio</b>	-	-
<b>Other investments</b>	-	-
<b>Total</b>	-	-

**10.4 Material investment holdings****If any single investment is material in terms of its value (for example represents more than 5 per cent of the value of the charity's total investments) please provide details.**

<b>Investment held</b>	
<b>Market Value</b>	

**Section C****Notes to the accounts****(cont)****Note 11 Debtors and prepayments***Please complete this note if the charity has any debtors or prepayments.***Analysis of debtors**

	Amounts falling due within one year		Amounts falling due after more than one year	
	This year £	Last year £	This year £	Last year £
Trade debtors	270.0	120.0	-	-
Amounts due from subsidiary and associated undertakings	-	-	-	-
Other debtors	2,515.0	2,076.0	-	-
Prepayments and accrued income	1,008.0	-	-	-
<b>Total</b>	<b>3,793.0</b>	<b>2,196.0</b>	<b>-</b>	<b>-</b>

**Note 12 Creditors and accruals***Please complete this note if the charity has any creditors or accruals.***12.1 Analysis of creditors**

	Amounts falling due within one year		Amounts falling due after more than one year	
	This year £	Last year £	This year £	Last year £
Loans and overdrafts	-	-	-	-
Trade creditors	-	-	-	-
Amounts due to subsidiary and associated undertakings	-	-	-	-
Other creditors	-	-	-	-
Accruals and deferred income	2,179	1,478	-	-
<b>Total</b>	<b>2,179</b>	<b>1,478</b>	<b>-</b>	<b>-</b>

**12.2 Security over assets***If any loan, overdraft or other creditor holds a charge or other security over any assets of the charity please provide details.*

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Section C	Notes to the accounts	(cont)
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**Note 13**                      **Endowment and restricted income funds**

*Please complete this section if the charity has any endowment or restricted income funds.*

**13.1 Funds held**

Please give a brief description of any of the following type of funds held by the charity:

- permanent endowment funds (PE);
- expendable endowment funds (EE); and
- restricted income funds, including special trusts, of the charity (R).

Fund Name	Type PE, EE or R	Purpose and Restrictions
Centenary Fund	R	To celebrate Centenary of the Society

**13.2 Movements of major funds**

*Please give details of the movements of the major funds summarised in the restricted and endowment columns of the Statement of Financial Activities.*

Fund names	Fund balances brought forward £	Incoming resources £	Outgoing resources £	Transfers £	Gains and losses £	Fund balances carried forward £
Centenary Fund	-	11,332	-	8,203	-	3,129
	-	-	-	-	-	-
	-	-	-	-	-	-
	-	-	-	-	-	-
	-	-	-	-	-	-
	-	-	-	-	-	-
<b>Total Funds</b>	-	11,332	-	8,203	-	3,129

**13.3 Transfers between funds**

*Please give details of any transfers between funds.*

From Fund (Name)	To Fund (Name)	Reason	Amount

## Note 14 Transactions with related parties

*If the charity has any transactions with related parties (other than the trustee expenses explained in note 6) details of such transactions should be provided in this note. If there are no transactions to report, please enter "None" in the relevant boxes.*

### 14.1 Remuneration and benefits

*Please give the amount of, and legal authority for, any remuneration or other benefits paid to a trustee or other related parties by the charity or any institution or company connected with it.*

Name of trustee or connected party	Legal authority (eg order, governing document)	Amounts paid or benefit value	
		This year £	Last year £

### 14.2 Loans

*Please give details of and amounts owing to or from the charity's trustees or other related parties by the charity at the year end.*

	Name of trustee or connected party	Legal authority	Amount owing	
			This year £	Last year £
Due to trustees and related parties				
Due from trustees and related parties				

### 14.3 Other transaction(s) with trustees or related parties

*Please give details of any transaction undertaken by (or on behalf of) the charity in which a trustee or related party has a material interest.*

Name of the trustee or related party	Relationship to charity	Description of the transaction(s)	This year £	Last year £

Note 15

Additional Disclosures

The following are significant matters which are not covered in other notes and need to be included to provide a proper understanding of the accounts. If there is insufficient room here, please add a separate sheet.

## **Independent examiner's report to the trustees of The Norwich Society**

I report to the trustees on my examination of the accounts of the The Norwich Society (the Trust) for the year ended 31 December 2023.

### **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 all 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 in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view which is not a matter considered as part of an independent examination.

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

Signed:



Name: Adam Piercy

Relevant professional qualification: FCA Fellow of the Institute of Chartered Accountants in England and Wales

Date: 15th March 2024