



First annual charity return for HTVF: Narrative for 7 October 2024 to 31 July 2025

Charity Name: The Historic Towns and Villages Forum (HTVF)

Registered Charity Number: 1210370

Charity's principal address: HTVF, Kellogg College, 62 Banbury Road, Oxford, OX2 6PN

CIO Foundation registered on 7 October 2024

Summary of the charity's purposes, as set out in its governing documents:

The Forum is established for the public benefit for the following purposes throughout England and Wales in historic towns and villages which shall hereinafter be referred to as the "area of benefit":

- i) to promote high standards of planning and architecture in or affecting the area of benefit
- ii) to educate the public in the preservation, protection, development and improvement of the environment and sites or features of historic or public interest in the area of benefit
- iii) to promote or conduct research into preservation, protection, development and improvement of the environment and sites or features of historic or public interest in the area of benefit and publish useful results for the public benefit

Summary of the main activities in relation to those purposes for public benefit:

- Delivery of educational activity (in-person events, webinars, newsletters, collaborations with other organisations) to promote high standards of planning and architecture.
- Provision of up-to-date and relevant material for those working to improve the environment and look after sites of historic or public interest.
- A renewed focus on smaller-scale settlements through a project on villages and community-owned assets that was undertaken in this first year as a charity.

Contribution made by volunteers:

The trustees are the main volunteers of the charity. 2 micro-internships took place between October 2024 and July 2025, providing opportunities for students to learn about the sector and take part in a small project. There is interest in involving new volunteers in other charity activities, subject to capacity to support volunteers.



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:

Programming

- Delivery of final programme event for HTVF's 'Reaching Rural Communities' project, funded by the National Lottery Heritage Fund (NLHF): 'New neighbourhoods in old places: designing and delivering innovative and sustainable housing development' was held on 1 November 2024 at Kellogg College, Oxford. A page of project materials – including case studies – is on the website. Final reporting was submitted to the NLHF in mid-May 2025, as per grant requirements.
- Webinar: OpenHeritage and the rescue of 170-175 High Street, Sunderland with Professor John Pendlebury and Martin Hulse was on 4 December 2024.
- Webinar: Managing Green Spaces with Anna Eavis, Oxford Preservation Trust on 6 March 2025.
- In-person events: Two events in collaboration with Historic Buildings and Places (HBP) with visits to Manchester (1 April 2025) and York (12 May 2025). Walking tours and historic building visits to understand recent developments.
- In-person event: Workshop on housing, density and heritage assets with Ash Sakula Architects, held in their London studio on 12 June 2025.
- 50th Anniversary of the European Architectural Heritage Year (EAHY) event on 5 June 2025, coordinated by HTVF in collaboration with SAVE and the Historic Houses Association, in association with the Architectural Heritage Fund, Europa Nostra UK, the King's Foundation, the Heritage Alliance and Donald Insall Associates. 11 expert speakers presented in panels to discuss achievements of the last 50 years, take stock of where things are today and look at heritage sector ambitions for the next 50 years. A report from this hybrid event is available online.

Strategy & governance

- Trustees have formalised working arrangements and reviewed their new role and responsibilities as charity trustees.
- Trustees have reviewed a new strategic plan, including how we communicate with our key stakeholder groups.
- A trustee skill audit was undertaken prior to the recruitment of new trustees. Trustees have been provided with best practice guidance in the diversity and equality in recruitment, and the setting of clear terms for trustees, with staggered end dates to ensure continuity.
- Funding applications have been submitted, including one to the Swire Charitable Trust for core costs, which was successful.
- New policies have been written (Safeguarding; ED&I, H&S, Data protection and Donor giving) and other essential work (such as setting up new a new charity bank account) has been undertaken following charity registration.
- Declaration of interests routinely added to all agendas, with the request for declarations to be made at the start of a meeting. Any declared conflicts are recorded in the minutes.



- A review of membership rates has been conducted, using further sector analysis to build on the in-depth analysis of organisations in the sector that was conducted by the Executive Directors in early 2023.

Engagement

- Communications with members: ongoing contact with members and wider networks, including monthly e-newsletters and regular social media updates to strengthen organisational ties and interests.
- Continued partnership working with the Herbert Lane Trust, who support the HTVF through a grant, as well as through their trustees' knowledge and active involvement in events and through shared connections with Kellogg College, Oxford.
- Invited attendee at a 'friends planning meeting', convened by Historic England and the Humanise Campaign, to explore the emotional connection between people and buildings, and the role of the historic environment in wellbeing at a time when Britain is about to start building again on a significant scale.
- Second round of Oxford University micro-internships hosted in December 2024.
- Follow-up with contacts from the Oxford Open Doors (OOD) event held in conjunction with Kellogg College on 14 September 2024, including engaging with the OOD organisers, the Oxford Preservation Trust on topics of mutual interest.
- Attendance at a variety of other external events to represent HTVF, including the Heritage Alliance Heritage Day (March 2025) and Humanise Summit (April 2025, linked to the campaign to make buildings better for all).

Public benefit

The Trustees confirm that activities in the period of this return have been consistent with its rules and that they have had due regard to the guidance on public benefit published by the Commission



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name

No (if any)

Receipts and payments accounts

CC16a

For the period from	Period start date	To	Period end date
	7th October 2024		30th June 2025

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
	4,312	-	-	4,312	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	4,312	-	-	4,312	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	4,312	-	-	4,312	-
A3 Payments					
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	-	-	-	-	-
Net of receipts/(payments)	4,312	-	-	4,312	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	4,312	-	-	4,312	-

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash at bank	5,068	-	-
		-	-	-
		-	-	-
	Total cash funds	5,068	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
	Moneys owed related to the CIC (cash transferred less accrual)		756	
	Accountancy fees for first charity year end		180	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
		Steven Bee	26 05 2026	