



The Stratford-upon-Avon Society

Trustee Report and Accounts for the Year ending 31st December 2024

MARCH 17, 2025
STRATFORD-UPON-AVON-SOCIETY
Registered Charity No: 251182

**THE STRATFORD-UPON-AVON SOCIETY
REGISTERED CHARITY NO: 251182**

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**THE STRATFORD-UPON-AVON SOCIETY
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President	Dr Kevin Bond
Vice Presidents	Professor Ian Heggie Dr Roger Pringle
Chairman	Jann Tracy
Vice Chairman	Dr Lindsay MacDonald
General Committee (Trustees)	Jonathan Devereux (Treasurer) John Scampion CBE Margaret Cund (Planning) Ian Fradgley (Membership) Steve Turner (Planning) Helen Elliott (Publicity) Dr Robert Bearman MBE (Civic) Ellie Stevenson Ian Prosser (Civic)
Note	
Charity Number	251182
Hon Secretary	<i>Vacant</i>
Bankers	Barclays Bank plc Market Cross Stratford-upon-Avon Warwickshire CV37 0EA
Independent Examiner	Wende A Hubbard FCCA Burgis & Bullock 8 Elm Court, Arden Street Stratford-upon-Avon CV37 6PA

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Trustees report for the year ended 31st December 2024

The Trustees present their report and financial statements for the year ended 31st December 2024.

Constitution, Objects and Policies

The Society is constituted by Trust Deed dated 19th January 1966 and is registered with the Charity Commission, Registration Number 251182.

Appointment of Trustees is governed by the constitution of the Charity. The Board of Trustees to fill vacancies arising through resignation or death of an existing Trustee.

The Trustees comprise the officers of the Stratford-upon-Avon Society and are responsible for managing the business of the society according to Charity Law.

The Trustees have had regard to the Charity Commission guidance on public. The Charity is established for the public benefit which through its objects and principal activity is within the area of Stratford-upon-Avon and its surroundings

- To promote high standards of planning and architecture;
- To educate and stimulate public interest in the geography, history, natural history, and architecture of the area;
- To encourage the preservation, protection, development, and improvement of features of historic or public interest in the area The society will through its general committee;
 - Consult and work with the local planning authority, planning committees and all other statutory authorities, educational institutions, voluntary organizations, charities and persons having similar aims to the society;
 - Pursue these aims through meetings, exhibitions, lectures, publications, other forms of education, publicity, and promotion of schemes of a charitable nature
 - Raise funds for the furtherance of charitable objects through contributions from person or persons by way of subscription, donation, or other contribution.

Annual Review

Chair's Report for 2024

The year saw the monthly speakers get off to a cracking start with a Talk in January by Professor Emma Smith on the Myths of Shakespeare, a very well-attended event. February saw the start of Talks engaging with local organisations, including Warwickshire Archaeology with a fascinating description of the Dig at Teddington looking at evidence from the Iron Age onwards of early Stratford citizens. Other speakers were from the Shakespeare Birthplace Trust (SBT), Warwickshire Wildlife, the Net Zero campaign, the Guild Chapel and a local hotel. We also heard about Shakespeare's Stratford and local world-famous war artist Bruce Bairnsfather. Society Committee member Dr Robert Beaman gave us an update on the Stratfire Project and we also heard about a new initiative from a group called Arts Rising Collective.

Our Summer outing was a visit to Hall's Croft, sadly closed to the public for a while now, and though we were not allowed inside the building, we had welcome speeches from the Interim CEO of the SBT and an informative talk from the head gardener; fortunately the weather was kind to us.

This year saw the Society continue its work on both the Stratfire Project, in collaboration with English Heritage, and the installation of plaques along the Historic Spine. At the beginning of September we had a Heritage Open Day event at No.1 High Street, highlighting the Stratfire Project. The Society sponsored a children's event at the Stratford Literary Festival and had a stall throughout the event exhibiting what we are and what we do.

This year was the centenary of the writer and activist Marie Corelli, and the Society celebrated her eventful life with an exhibition at Harvard House (in collaboration with SBT), a walk and talk by Dr Robert Bearman and concluding with a very successful event at the Town Hall.

Last, but by no means least, we had another evening trying to answer more fiendish questions set by Margaret Cund for the Christmas Quiz night. Everyone present appeared to enjoy themselves, and I continued the trend started last year of members not having to pay to participate.

Membership continues to grow thanks to all the committee members who continue to keep the Society in the public eye.

During 2025 we have a full set of speakers, and I am already setting out the list for 2026.

Jann Tracy
Chair
February 2025

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Publicity Officer Report for 2024

During 2024 I have attended the Society's meetings and prepared 12 reports on meetings and events for the Herald, and for the Facebook Page, via John Freeland, who is its administrator.

As I said last year, I do not have statistics about the effect of this publicity, but we have some evidence from people that they have been to meetings and joined the Society as a result of reading the articles.

My reports of meetings are also being sent by e-mail by John Freeland to the whole membership, which is helpful to those who did not come to the meetings or as a reminder for those who did.

Helen Elliott, Publicity Officer
5 February 2025

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Membership Report

The Society has a constant need to grow membership both for financial security but also so that we remain respected in the local community as a voice to be recognized – for instance as a consultee formally in planning applications.

Membership growth

The society successfully grew members during the year. From a membership base of 142 at the December 2023 meeting we had 201 members a year later. This has been achieved by

- successful events – such the Marie Corelli centenary
- A full program of talks, including early on, into 2025
- Promotion opportunities – Heritage Open Day, Literary festival stand
- Selling discounted taster membership in the last three months of the year

Meeting Attendance

We had 416 attendances at meetings during the year with 106 different members attending at least once and 48 guests, some of whom went on to join as members. We twice had more than 60 people attending popular talks.

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Planning Report

2024 Report of the Planning Sub-Committee As in 2023, the planning permission of especial interest to the Society relates to the Debenhams site for which Stratford District Council (SDC) has given consent for demolition of the existing building. The planned date of December 2023 has passed and, while work appears to be going on inside the building, no revised date has been announced for demolishing the frontages. Nevertheless, Warwickshire County Council has already announced that it will put in place a one-way system along High Street during demolition. The Society understands that the delay is a consequence of an escalation in the costs of building the Hilton Hotel planned for the site. Bell Court is in discussions about ways to reduce these costs without sacrificing quality. It has given an assurance that demolition will not take place until there are firm plans for a replacement building.

Meanwhile, the former BHS site in Bridge Street remains an eyesore, and an embarrassment to the town. It seems probable that it will eventually be redeveloped for retail and residential purposes. The Society has urged the SDC to speed up its discussions with the site's agents about its future, so that work can get underway.

On a positive note, the SDC has refused planning permission for 130 dwellings on Bordon Hill, to which the Society objected. However, there have been no developments regarding some others planning applications of interest on which consultation closed as long ago as 2022. The Society continues to watch these closely.

In December, members of the Society's General Committee were pleased to have a meeting with George Cowcher, Deputy Leader of the SDC, and Portfolio Holder for Planning and Development, at which we were able to raise matters of concern. It is intended to maintain this relationship.

For the coming year, the principal issue for the Society will be the development of a Local Plan for South Warwickshire. Following the change in Government in July, Councils are required to accelerate housebuilding between 2027 and 2050. Although twelve sites within the SDC's boundary are up for consideration, it is expected that no more than two of these will be needed to meet the new requirement. The Society will emphasise the importance of developing appropriate infrastructure (transport system, schools, medical facilities etc) and employment opportunities alongside the construction of housing. In terms of building standards, we shall seek design and layout appropriate to the area.

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The Town Centre Report

Last year I reported on the work of the Town Centre Strategic Partnership. The strategy and vision I outlined have been completed but it's still awaits public consultation, due during the course of this year.

The scheme for Bridge Street and High Street, which was first proposed in the Neighbourhood Plan of 2018 still awaits a start. It had a successful public consultation and was agreed by all three local authorities. Unfortunately, external funding did not prove possible and so far neither the County Council nor the District Council have been able to fund it's going forward. Recently, the District Council have pressed for the High Street "pedestrianisation" part of it to proceed and have set aside some funds. But this is yet to be agreed by the County Council whose responsibility as Highway Authority it is. The matter is complicated by the scheme for the demolition of the former Debenhams building and it's replacement with a hotel and shopping. That scheme was set to begin late last year but has been deferred for its cost to be re-examined and a possible new contractor appointed. And so long as the Debenhams' scheme was set to go ahead last year, the County Council had firmly said they would not proceed with the pedestrianisation of High Street but I understand that in the light of the deferment that decision is being reconsidered. The frustration of both the Society and the Partnership have constantly been expressed at this unsatisfactory situation.

Elsewhere, there is regrettably little progress to be reported on the dilapidating BHS site. But that is not down to any lack of interest or activity on the part of the District Council who I understand are constantly in touch with the owners and pressing them proceed, not a straightforward matter given the difficulty of re- developing the site and the apparent remoteness of the ownership.

The Society has expressed concern about the vacant buildings in the town. There has been some progress in High Street of late although concern is growing about the continuing lack of activity around the Shakespeare hotel. The District Council have set up a small team to monitor town centre vacancies and press and support the owners in trying to find satisfactory occupiers. That at least is a positive step forward.

There is a more optimistic report on the historic spine. The Historic Spine Working Group on which I reported last time has met to advise the society on the delivery of the next phase of the pavement plaques scheme. In addition to Society members the working group now has on it representative of the District Council and of the town trust. it now has nine members- five from the Society and four external members.

There are six proposed plaques in the next phase:

Shakespeare's birthplace and Hornby cottage(at the rear of the bookshop in Henley Street) – two plaques funded by the Shakespeare Birthplace Trust where the contents have been agreed subject to minor amendments.

The County Library funded jointly by Councillors Jenny Fradgley and Tim Sinclair – agreed subject to minor amendment of the wording.

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The Chapel Street bookshop Chaucers Head- where the wording is being approved by the owner. It will be funded as to 50% by him.

Barclays Bank – the bank have agreed to proceed and fund in principle but have yet to agree the wording. HSBC Bank- again the bank have approved in principle but yet to agree the wording.

We expect all six of these packs to go ahead during the year. The cost to the Society of these six will be up to £1000 to cover 50% of the Chapel Street bookshop plaque and the laying costs of some of the plaques.

John Scampion - February 2025

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Stratfire Project Report.

The Society was awarded a grant for a four-year project to date through dendrochronology selected buildings along the Historic Spine thought to have been affected by the fires of 1594/5 and 1614. Associated volunteer research led by Dr Robert Bearman into buildings and families in occupation at that time seeks to explore the impact of these fires on individuals and the economy of Stratford upon Avon. The grant awarded now totals £41,105 predominantly funds building archaeologists providing the detailed targeting for the Historic England appointed dendrochronologist to undertake sampling. The £480 added in 2023 for public engagement needs to be matched by contributions from the society to publicise the project.

Project income and expenditure.

Grant spending is determined by availability of building archaeologists, access negotiated with multiple stakeholders, but also the feedback loop from Historic England's work funded from their budget for dendrochronological sampling and subsequent lab based dating. There are inbuilt delays after field work given the competing demands for the time of the Historic England laboratory analysis. From June 2024 we also had no dendrochronology service due to illness with work resuming in 2025.

Dendrochronology Progress

1 High Street – surveyed 4th March 2024 and sampled on 9th April 2024 with the full report published by Historic England.

17/8 High Street - surveyed in April 2024, with samples taken on 14th May 2024. The dating report was awaiting publication at the close of the year.

19,20 & 21 High Street – with access finally negotiated during 2024 to 21 High Street the survey and sampling was completed on 15th February 2024 and Sampling undertaken on 9th April 2024. The final dating report was published on 31st December 2024.

Tudor House 23-24 High Street was surveyed and sampled in May 2023. A draft report on dating was issued in February 2024 and a final dating report published on 31 December 2024.

25 High Street – Garrick Inn Field work was completed in 2022. With interim dendrochronology results in February 2023 . The final scientific dating report is awaited.

Harvard House, 26 High Street was surveyed during 2023 and sampling in April 2024. A draft dating report was issued on 10th December 2024.

Hoorays 27/28 High Street field work was completed in September 2023. Highlights of the draft dating report were shared on 13th March 2024, with the final report awaited at the close of the year.

20 Chapel Street – access could not be negotiated in 2024, the building is the last target building on the East side of Chapel Street awaiting field work.

21 Chapel Street – Chaucer's Head Bookshop further analysis awaits Historic England determining to apply more expensive dating techniques.

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22 Chapel Street – Nash’s House with field work completed in 2022 the final dating report was published on the 31st December 2024. This may prompt further review by the team.

14-19 Chapel Street – Shakespeare Hotel Sampling took place in January 2023. Limited dating reports have been issued in 2023.

Documentary histories

Documentary Histories have been completed for all buildings with repeat versions as dates emerge and lead to review of support for dates found. Histories have also been completed for key buildings interspersed with those being sampled but long since demolished – for example the site of Debenhams and HSBC bank – six buildings and 22 High Street once the Corn Exchange now open space.

Review Process and updates

The delay between completing field work and dating by Historic England together with the difficulty in accessing groups of buildings remains an issue. Significant sums in the budget (£7,992) are provided for reviewing the linkage between buildings sampled. In Chapel Street for example, No. 20 in the middle of 14 – 22 has yet to be accessed, and incomplete dating of 14-19 means that budget has yet to be spent. A complication is that advanced dating techniques are not within the project budget but a decision for Historic England and their budget – that further restricts the ability to complete work where dating is inconclusive or not possible from traditional dendrochronology.

Communications

Articles in the Stratford Herald and blogs have been produced during the year. A particular success was the Heritage Open Day on 6th September in 1 High Street, where a meet the expert’s session was held and actual samples taken from the building on display. Progress continues to be publicised on the website:-

<https://www.stratfordsociety.co.uk/stratfire>

[Houses in High Street \(stratfordsociety.co.uk\)](https://www.stratfordsociety.co.uk/houses-in-high-street)

[Houses in Chapel Street \(stratfordsociety.co.uk\)](https://www.stratfordsociety.co.uk/houses-in-chapel-street)

Steering Group

Four steering group meetings have been held updating stakeholders. Challenges remain in negotiating access and availability of team members matching with access slots. Historic England are aware of the challenges and used to the need to slip budget provision between financial years given this is a project with multiple stakeholders to consider for each building who have no obligation to participate. At the close of the year an update report led to a further draw down of £5,000 on 13th January 2025. That will secure cash flow as the team respond and update following the flurry of dating reports publish on the last day of the year.

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Independent Examiner's report to the Trustees

I report to the charity trustees on my examination of the accounts of the charity for the year ended 31st December 2024.

Responsibilities and basis of report

As the Charity's Trustees you are responsible for the preparation of accounts in accordance with the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the 2011 act and in carrying out my examination I have followed all 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 charity as required by section 130 of the Act; or*
- 2. The accounts did not accord with those records.*

I have no concerns and have come across no other matter 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

*Wende A Hubbard FCCA
Burgis & Bullock
8 Elm Court
Arden Street
Stratford-upon-Avon
CV37 6PA*

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Financial Report 31 December 2024

Bank position at: 31 December 2024.

Deposit Account	£12,147.91	Current Account	£ 100.00	£12,247.91
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Receipts for the year of £5,624 (£10,227) included £1,196 (£6,536) for restricted funds and £4,428 (£3,691) from general activities.

The major change in 2024 was a pause in the draw down of funding for **Stratfire** occasioned by an enforced slowdown in the project when the Historic England dendrochronologist was unavailable through illness. **Membership** receipts and associated **gift aid** saw a significant increase. Popular 2024 talks, a full program for 2025 and other events outline below undoubtedly contributed to this increase.

A grant of £1,000 from the Town Trust helped the society stage an event marking **Marie Corelli's** centenary. Funds carried forward represent the net balance of donations beyond the grant not spent on cost items the grant was not designed to fund. The balance carried forward for any future event amounts to £492 (£596).

Both at monthly talks and attendance at the literary festival gave the opportunity to sell memberships and publications. There were fewer sales of the Historic Spine leaflet partially as the Local History Society has a free publication which limits sales based at the Tourist Information Centre.

Plaques Just one plaque was installed during 2024, with a further six in advanced negotiations with installation expected during 2025. Where possible any sponsor is asked to cover the cost. That may mean designation is generous.

Membership receipts before gift aid exceeded 2023, totaling £2,718 (£2422) and the position in January 2024 indicates expected renewals will mean a slight increase in the year ahead. The General Committee has discussed plans to further promote membership to improve on that.

Gift aid received in 2024 - £513 (£377) follows the general increase in membership.

MOSA A future project may become the aim to create a Museum of Stratford upon Avon by the Stratford-upon-Avon Local History Society. It is foreseeable that a designation of funds to help in that process might be made at the Trustees discretion.

Reserves net

Trustees will further review the level of reserves appropriate in the year ahead. That will include any provision thought necessary for general promotion to encourage membership to increase. The £480 additional grant from Historic England in 2023 assumed match funding from the Society. The reserves for Stratfire increased in January 2025 by £5,000 with a further drawdown of grant as the project restarts meaning relatively low close of year reserves have been corrected.

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	<i>£</i>
Cash Position @ 31st December 2024	12,248
Held for Stratfire	718
Held for Corelli Fund	492
Held for Plaques	820
Restricted reserves	2,030
Designated for Plaques	5,050
<i>General reserves</i>	5,168
Total Reserves	12,248

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Receipts and Payments Account for year ending - 31 December 2024

	<i>Restricted</i>	<i>Unrestricted</i>	2024	2023
			<i>Total</i>	<i>Total</i>
		<i>£</i>	<i>£</i>	<i>£</i>
RECEIPTS				
Subscriptions		2,718	2,718	2,422
Stratfire	-		-	5,480
Plaques	-		-	1,006
Corelli Fund	1,196	155	1,351	50
Gift Aid		513	513	377
Sales - misc		409	409	360
Visits & attendance		370	370	345
Bank Interest		263	263	187
Total Receipts	1,196	4,428	5,624	10,227
PAYMENTS				
		<i>£</i>	<i>£</i>	<i>£</i>
Governance & admin				
Insurance		388	388	395
AGM		75	75	75
Inspection		348	348	312
Committee Meeting costs		275	275	151
commission and charges		43	43	9
	-	1,130	1,130	942
Talks, Presentations and communications				
Zoom Fees		156	156	144
Promotion		500	500	40
Website		300	300	300
Members meeting costs		1,039	1,039	736
	-	1,996	1,996	1,220
Events and Visits				
Prior Year Events		-	-	464
Christmas Party		443	443	322
	-	443	443	786
Projects				
Stratfire	6,031	438	6,469	4,242
Marie Corelli Centenary	1,300	861	2,161	-
Pavement plaques	1,186	-	1,186	624
Historic Spine	-	-	-	-
	8,517	1,299	9,816	4,866
Total Payments	8,517	4,868	13,385	7,814
Net of (Payments)/ Receipts	(7,321)	(440)	(7,761)	2,413
Funds as restated at 31st Dec 2023	9,351	10,658	20,009	17,596
Funds at 31st December 2024	2,030	10,218	12,248	20,009

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Statement of Assets and Liabilities as at 31st December 2024

	2024	2023		
ASSETS - Cash funds	£	£		
Barclays Bank - Current Account	100	124		
Barclays Bank - Deposit Account	12,148	19,885		
Total Cash	12,248	20,009		
Debtors	-	-		
Creditors	-	-		
Total assets	12,248	20,009		
RESERVES	Restricted	Unrestricted	2024	
			£	
			2023	
			£	
Stratfire	718		718	6749
Plaques Donations	820		820	2,006
Plaques Designated		5,050	5,050	5,050
Marie Corelli Fund	492		492	596
General Reserve		5,168	5,168	5,608
Reserves at 31st December 2024	2,030	10,218	12,248	20,009

Approved by the board on 17/03/2025 and signed on their behalf by:

Jann Tracy

Chair of Trustees

Jonathan Devereux

Honorary Treasurer and Trustee