COMMITTEE REPORT

Subject:	*Annual Report to the Lower Bemerton Trust Annual General Meeting*
Committee:	*Lower Bemerton Trust*
Item Number:	*5*
Date:	*13 July 2026*
Author:	*Steve Bishop, Responsible Finance Officer*
Report status:	*Decision*
Confidential / Exempt:	*No*

1. Report Summary

1.1. It is customary for the Responsible Finance Officer (RFO) of Salisbury City Council to submit an annual report to the annual general meeting (AGM) of the Lower Bemerton Managing Trustees Committee.

1.2. Salisbury City Councillors serve as managing trustees to the Trust. This report seeks trustee approval of the Trust's Statement of Account for 2025/26 and seeks authorisation to reimburse Salisbury City Council an annual revenue grant.

2. Recommendations

It is recommended that the Managing Trustees:

2.1. Authorise a payment of £14,550 to the Council, being the annual recharge for maintenance costs in respect of 2025/26.

2.2. Approve an annual revenue grant for 2026/27 to Salisbury City Council of up to £15,000 from the Lower Bemerton Recreation Ground and Endowment Fund Trust.

2.3. Note the emerging considerations regarding potential future improvements to site accessibility and facilities, including a possible upgrade of the toilets and the installation of accessible paths and inclusive play equipment. Trustees are asked to consider whether Trust funds could, in principle, be used to support such enhancements, subject to further proposals and costings being brought forward.

2.4. Note the absence of any specific objectives for the Trust and the question marks over the need for it in the future.

3. Background

3.1 Salisbury City Council is the current sole trustee to the Lower Bemerton Recreation Ground and Endowment Fund Trust (usually referred to simply as 'Lower Bemerton Trust'). All 24 city councillors act as managing trustees to the Trust. The Trust is a registered charity. The Council's RFO and usually one other council officer serve as the Trust's administrative officers.

3.2 The Council has very few records covering the Trust's 94 year history. The recreation ground was gifted to the Salisbury City Council's predecessor authority in 1932. At some point before or during the 1980s a Trust was formed to discharge the donor's intentions for the recreation ground to be perpetually maintained for the enjoyment of Salisbury residents.

3.3 During the 1980s the then sole trustee, Salisbury District Council (SDC), requested permission from the Charity Commission to purchase the recreation ground from the Trust. This conveyance was completed, with SDC becoming the new owner of the ground in exchange for the sale proceeds passing to the Trust. The Trust's funds have been invested and accumulated since that date and now exceed £200k. The land passed into the City Council's ownership when it succeeded SDC.

3.4 When the Charities Commission authorised the sale during the 1980s it indicated that new charity objectives would be required by the Trust, given the ownership change. The Commission stated that it would provide the Trust with new objectives. Recently the Commission has confirmed that it never did so.

4. Annual Maintenance Recharge

4.1 The Council's statement of account listing all rechargeable costs totalling £14,550 is provided in Appendix A.

4.2 The reduction in total costs from 2024/25 is welcome. There is some variability in annual costs due to the timing of utilities and the unpredictability of repair needs.

4.3 Officers cannot foresee any significant changes in costs, other than the potential major improvement works discussed in section 5 below, and therefore suggest a commensurate £15,000 maximum level of grant for next year.

5. Potential Major Improvement Works

5.1 The Disability Interest Group of Salisbury approached Council officers during 2025 to indicate the potential need for major accessibility improvement works to the park. No detailed discussions have taken palace nor designs been produced, but it is thought such works could cost up to £50k.

5.2 Given that the Council owns the park but that the Trust holds funds of over £300k arising from the park's sale and would appear to still have some duties in respect of the long term accessibility of the park, the question arises as to which body should fund any such works.

5.3 The trustees are requested to note the potential works at this stage. Any detailed discussions and designs will be reported to the Trust. The funding can also be discussed at that time.

6. Future of the Trust

6.1 The current aims and objectives of the Trust are unclear. Given that the Council owns the ground and adequately maintains it to the same standard as other city parks, it is discharging the original donor's wishes. The Council has every intention of maintaining this (and its other parks) in perpetuity. The future of the park seems assured without the involvement of the Trust, whose sole purpose now appears to be to use its funds to cover the annual maintenance costs – which the Council would otherwise do, as it does for its other parks.

6.2 There seems little benefit from maintaining the Trust. Indeed, the extra officer time needed for its administration, including Charity Commission returns, arranging Annual General Meetings, recharges from the Council and cheque writing, would all be saved if the Trust were wound up. However any move to dissolve the Trust would be complicated and will likely require specialist legal advice.

6.3 Unless the Trust or the Council decides to initiate winding-up and legal advice, officers will continue the annual recharge and AGM process.

11. Implications

Implication Area	Impact	Comments / Mitigation
Financial	Low	The recreation ground costs the Council c. £15k p.a. which is currently recharged to the Trust. If the arrangement stopped, the Council would still have a responsibility to maintain the ground and the cost would fall directly on the Council. Any specialist legal advice to resolve the Trust's objectives or future would cost extra.
Legal	Low	The only legal duties for the Council arise from its role as landowner of the ground – which are being discharged. There are additional Trustee legal risks if our councillors (the 'managing Trustees') do not discharge their trustee duties.
Risk	Low	Only the risks identified above.
Personnel	Low	The administrative duties to support the Trust are minimal and are absorbed by the RFO.
Environmental Impact	Low	The Lower Bemerton Recreation Ground is a much valued public asset. The Council cares for it as carefully as its other parks. If the Council stopped maintaining the Ground, it would adversely affect the environment.
Equalities Impact Statement	Medium	The Disability Interest Group of Salisbury has indicated that significant accessibility improvement works are needed.
Community / Public Impact	Low	See Environmental impacts. Also, the Gound and this Trust were established in 1932 by generous public benefactor. This report suggests it may be time to wind up the Trust, which might be considered negatively by the Community.
Procurement / Contractual	None	
Property / Asset	Low	This asset is owned by the Council. The Trust has an obscure third party interest in overseeing the Council's care of this asset. The report recommends that this interest should end.
Data Protection	None	

12. Appendices / Background Papers

12.1 Appendix A – Statement of Account 2025/26

APPENDIX A

Lower Bemerton Recreation Ground and Endowment Fund Trust

Statement of Account 2025/26

Charity Commission Number 1081377

	2024/25 expenditure RE-STATED	2025/26 expenditure	Notes
	£	£	
SCC Revenue Account 2024/25			
Electricity	420	453	
Repairs & Maintenance	2,613	1,046	
Health & Safety	500	30	
Grounds Maintenance	1,547	1,611	
Waste Disposal	3,120	3,248	
Water & Sewerage	1,617	645	
Cleaning charges	6,462	7,232	
Insurance Premiums	238	285	
Total	16,518	14,550	
Adjustments (rounding)	(18)	0	
Total to be reimbursed	16,500	14,550	
Natwest Bank Account			
Opening balance 1st April	39,093	53,987	
M&G dividends received in year	14,594	15,320	
Compensation paid by bank	300	0	
Less SCC previous year reimbursement		(36,294)	
Closing balance 31st March	53,987	33,013	
Less accrued for previous year(s)	(36,294)	(14,550)	
Adjusted balance at year end	17,693	18,463	
Investments and Savings			
M&G Securities Ltd (16,126.237 units)	244,845	289,366	
Natwest Account (adjusted)	17,693	18,463	
Total at year end	262,538	307,829	

Notes

(None)