

**REGISTERED COMPANY NUMBER: 03256311 (England and Wales)**

**REGISTERED CHARITY NUMBER: 1060697**

**REPORT OF THE TRUSTEES AND  
UNAUDITED FINANCIAL STATEMENTS FOR THE YEAR ENDED 30 SEPTEMBER 2021  
FOR  
YORKSHIRE GARDENS TRUST**

UHY Calvert Smith  
Chartered Accountants  
Heritage House  
Murton Way  
Osbaldwick  
York  
YO19 5UW

**YORKSHIRE GARDENS TRUST**

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FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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The Yorkshire Gardens Trust was incorporated in September 1996, became a registered charity in February 1997 and is a company limited by guarantee and not having a share capital.

#### **OBJECTIVES AND ACTIVITIES**

##### **Objectives**

The Objects of the Trust are:

- (1) to promote the education of the public on matters connected with garden land.
- (2) to promote the protection, conservation and appropriate treatment of whatever garden land may exist or have existed in and around the counties of North Yorkshire, South Yorkshire, East Yorkshire and West Yorkshire for the education and enjoyment of the public.

##### **Delivering our Objectives**

The Trust is active on a number of fronts in pursuit of its objectives. The Trustees have regard to the public benefit guidance published by the Charity Commission when formulating these activities.

The Trust has a strategy of advocacy and consultation with our members, professionals in related fields, private landowners and public authorities, heritage bodies, the wider public, with Government, and with and through the Gardens Trust, to promote our objectives. In particular, the Trust has links with:

The Yorkshire Philosophical Society	Royal Horticultural Society
The Folly Fellowship	Historic England
The Gardens Trust	Natural England
Other County Garden Trusts	York Civic Trust
The Arts Society	The National Trust
The Yorkshire Dales and the North Yorkshire Moors National Parks	The Borthwick Institute, University of York
The Local Authorities of Yorkshire	Ancient Society of York Florists

Specifically, the Trust is active in the following principal areas where the Trustees have delegated activities to sub-committees which have either at least one Trustee as a member or a designated link Trustee:

- Research and Recording
- Conservation and Planning
- Schools and Education
- Membership and Engagement
- Events

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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#### **ACHIEVEMENTS AND PERFORMANCE**

##### **HIGHLIGHTS OF THE YEAR: OUR PROGRESS AND SOME NOTABLE ACHIEVEMENTS**

This year has again been wholly marked for everyone by the impact of the Covid-19 pandemic. Gardens have been closed to visitors, designed landscapes have been inaccessible because of travel restrictions, and plans for activities have been thrown into the air like autumn leaves in a gale. YGT's response has been one of new planting, new growth and the renewed vigour that comes from judicious pruning, combined with a resumption of traditional activities from the middle of July, when most Covid-19-induced restrictions were removed.

We continued to meet via the Zoom platform, which, though lacking in physical presence (and shared tea and cake) brought its previous gains of reduced travel time and carbon footprint, and honed our new skills. We remained in close contact with our membership, issuing e-newsletters as well as our printed newsletter. We resumed our in-person events from early June, as our Events report shows. Appetite for these continues, and we have a full programme prepared for 2022. We have, and will, continue to offer on-line events. These have proved successful in attracting new audiences well beyond our Yorkshire heartland.

This year saw the retirement of our Treasurer, Nigel Tooze, who stepped down at the 2021 AGM. Nigel has looked after our finances most capably, and provided much help and guidance to his successor, YGT Trustee Maddy Hughes (reappointed as a Trustee at the AGM), who has picked up the task seamlessly. Gillian Parker volunteered for the important role of Company Secretary, adding to the work she has already been doing for our Research group. We welcomed the appointment of two new Trustees (neither of whom are strangers to YGT), in Christine Beevers and Roger Lambert, while Penelope Dawson-Brown was re-appointed after retiring by rotation.

Last year's report noted that since our formation the Trust has developed to a position where our work and achievements are admired and respected by fellow county garden trusts and colleagues in conservation and the world of parks and gardens. It is a credit to the dedication, passion and commitment of the current team and their predecessors that such a reputation has been achieved. The Trustees are grateful to those individuals who give their time and skills so generously.

#### **Progressing Our Vision and Strategy**

We laid out our plan for the years to 2022 in last year's annual report. It was inevitable that we would make slower progress this year compared to last; nevertheless, we have not stood still.

##### **- Partnership with National Trust**

We have continued to work with the National Trust, urging them to consider hard the future of Rievaulx Terrace and Temples, which was hit particularly badly by NT's response to mitigate the effects of the pandemic. We continue to approach such matters in a spirit of partnership and co-operation.

##### **- All Party Parliamentary Group on Parks and Gardens**

We had hoped to see two Yorkshire MPs sit on this newly formed body, Rachel Maskell of York Central and Clive Betts of Sheffield South East. YGT's Chair wrote to welcome them to the Group, and to offer them our support. However, as the group took some time to get going, Yorkshire representation upon it faded to extinction.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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#### **- Website and communications refresh**

The sub-committee we established to investigate and make recommendations on the refresh of our communications, publicity and promotion, including greater use of social media, met several times this year. Our discussions were, however, overtaken by events at the Gardens Trust, whose large grant from the National Lottery Heritage Fund is aimed at many of the areas we think important for developing YGT. We concluded that it would be appropriate to match the pace of our work to theirs, so we take advantage of the research and analysis they can perform on a larger base than we can. Nevertheless, prompted by pending obsolescence of the platform that supports our website, we embarked on a programme to rework this key manifestation of our public face. Led by Louise Wickham, and reaching every part of our organisation, we hope to have the new site up and running in Spring 2022. As well as a new look, the site will offer new capabilities that will help Council and our Committees to work more effectively, and enable members and the public opportunities to discover more about the range and depth of our work.

#### **Our challenges**

As ever, the Trust is reliant on the skills and willingness of our members to deliver our activities and achievements. Our Committees have some unfilled roles, and the lack of sufficient active volunteers coupled with the age profile of the membership continues to be a characteristic of this and other county gardens trusts. We are creating a new Development Plan in succession to the Business Plan that runs out in 2022, and this will identify and address this and other forthcoming challenges and opportunities.

#### **OUR PRINCIPAL ACTIVITIES**

##### **Research and recording: Louise Wickham**

Our core team members are Louise Wickham (Chair), Helen Caffrey and Mary Ratcliffe. In the course of the year two volunteers joined the team: Gillian Parker, building on her research on the garden at the Terry family house, Goddards, in York, and Kathryn Hughes, who is working with Chris Beevers in South Yorkshire. The team is keen to appoint a new editor following the departure of Helen Caffrey from this role.

A key activity of the year has been adding research reports to our website, where they can be accessed by all. More than 70 sites, covering the East Riding, Selby, Hambleton, Doncaster, North Yorkshire Moors National Park Authority (NYMNPA) and City of York, were added. Further work on making these reports even more accessible, via a database with a search function on our website, will take place in the next YGT year.

The team has continued to be held back by the difficulty of accessing archives this year. Despite the relaxation of restrictions in the middle of July, many archives have continued to devote much of their resource to handling remote enquiries. This works well if you have a defined or confined piece of research, but is less useful for the exploratory, serendipitous work that so often brings the unexpected discovery. Moreover, garden history research often has to be conducted in unexpected sources, whose wealth can only be determined by a personal visit.

The team discussed, and approved, a proposal to open our research to all Yorkshire, which will more readily respond to the interests of researchers, allow more flexibility and capture important unregistered landscapes that might otherwise remain unresearched for years. In the next year Louise Wickham and Mary Ratcliffe will draw up an initial list of around 30 sites that will be proposed as the focus for our research in the next 12 months.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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We will look to complete work on the following sites as soon as possible: Clifton Castle and Kiplin Hall for Hambleton; Busby Hall, Elleron Lodge, Hackness Hall and Ingleby Manor for NYMNPA and Cantley Hall, Frickley Park, Hooton Pagnell Hall, Owston Hall and Sprotbrough Hall for Doncaster.

#### **Conservation and planning: Val Hepworth**

Although all our Conservation and Planning sub-committee meetings have not been face-to-face this year due to the pandemic, we have continued to progress YGT's contribution to the future of our historic parks and gardens, with 12 members of the team. We were very sad to lose our stalwart on research and planning matters in West Yorkshire and the Yorkshire Dales National Park, Dr Anne Tupholme, in February. We have been delighted to welcome Brendan Mowforth onto the sub-committee to lead on our Small Grants Scheme.

As a statutory consultee the Gardens Trust sends the Trust details of all planning applications related to registered gardens and designed landscapes. On occasions the Trust is also consulted on planning applications relating to non-registered sites. A small group of the Conservation sub-committee reviews and responds to these applications and on occasion also draws on the local expertise of other Trust members to contribute to planning responses. The sub-committee works on planning matters with the Conservation Officers at the Gardens Trust, notifies Historic England of all its consultations and where appropriate, works closely with officers of Historic England, particularly landscape architect Chris Mayes and historic environment specialist, Dr Margaret Nieke of Natural England.

The Gardens Trust has organised several planning training webinars which we have found useful.

The Trust's specialist knowledge continues to be requested as expertise is limited within local authorities and Historic England, and development pressures on historic parks and gardens are unabated. We are now also being consulted by the Forestry Commission re felling/thinning licences for Registered Historic Parks and Gardens in Yorkshire. This year we have responded to 150 planning applications and Forestry Commission consultations finding that the planning load has increased a good deal. For some planning applications where we have more major concerns we are re-consulted for advice on amendments.

In addition, we have responded to the Government White Paper, 'Planning for the Future' and 'Supporting Housing Delivery and Public Services Infrastructure' and responded to various documents connected with a Conservation Management Plan for the Harewood Estate.

Our planning responses can be seen online on the relevant planning authority's website. Applications that are significant for their impact on a site or for the complexity of the response included developments at:

Bretton Hall, Moreby Hall, Pine Lodge at Wentworth Castle, Allerton Park, Cannon Hall, The Long Walk, Knaresborough, Vanburgh Bowl, University of York, Mulgrave Castle/Sandsend, Gilling Castle, Thehovels, Harewood Estate, Thwaite Hall, Cottingham, Ledston Hall, Wentworth Woodhouse, Roundhay Park.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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3 members of the Conservation Team have been working with staff at Lotherton Hall, Aberford and Leeds CC to organise a conference on Edwardian Gardens to be held at Lotherton Hall in June 2022. This has been postponed twice due to the pandemic.

#### **Small Grants Scheme: Brendan Mowforth**

There were fewer grant applications than usual due to the circumstances of the past year, but we are pleased to report that, with growing confidence about the course of the pandemic, requests for information about them have increased.

We made a grant of £1,000 to Broomhill community library, Sheffield, which was used to purchase plants for the restored rock garden. The overall garden had been designed by Percy Cane (1881-1976) in the 1920s when the property was a private residence, but had in recent times become much overgrown and neglected. Our Newsletter carried a report of the restoration work, and images of the successful scheme.

In addition, a grant of £600 was approved for Moorgate cemetery, Rotherham to enable its friends' group to create a planting area as the first phase of a major restoration project that will include the renovation of buildings. The cemetery was opened in 1832 and underwent a number of changes of ownership and management over the years, eventually becoming a municipal cemetery. This was paid after the financial year-end.

#### **Landscape and horticultural student bursary: Chris Beevers**

The Bursary Scheme was a new addition to YGT's Business Plan 2017-2022. YGT Trustee Pat Gore took on responsibility for developing and promoting the scheme. Through Pat's work a comprehensive outline of the scheme for potential applicants was completed and posted on the YGT website. She also initiated contacts with further and higher education institutions to identify students who would benefit from the bursary. At the same time YGT spent two years of fundraising to establish an initial fund to finance the scheme.

YGT is grateful to Pat for her hard work and personal commitment to and enthusiasm for the bursary scheme. With Pat sadly unable to continue in this role, the Trustees are establishing further priorities for the next stage of its development, which will also be included in the next Business Plan and the website update.

In 2021, building on Pat's earlier work, the content and format were reviewed and updated by Chris Beevers. This was approved by the Trustees and the funding level for the award was increased from a maximum of £500 to £1,000. Covid-19 has had a major impact on further and higher education institutions, limiting opportunities for accessing and promoting the bursary scheme.

As of 30 September 2021, £3,448 was available for the students' bursary. Renewed efforts are planned:

- to encourage organisations to use the resources YGT can offer and
- to supplement these resources.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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#### **Schools and education: Sue Lindley**

Through the Schools sub-committee, the Trust supports, advises and channels funds to our 52 member schools. The aim is to inspire and support gardening and a love and greater appreciation of the interaction between gardening and the natural world. This small and enthusiastic team have developed an approach where each year they develop an annual programme of support that provides a variety of opportunities to suit the schools involved.

This year the number of Grounds Development Awards offered was increased to 4 as it seemed likely that schools would be making more use of their outside space, as part of the effects of Covid-19. Interestingly, over 12 months, 10 more schools joined the YGT, bringing the total number of school members to 52.

During 2020/21 financial year we:

- Made gifts of broad bean seeds to all schools: £193.16.
- Offered bird feeders and seed to all schools; 23 schools took the offer up: £552.
- Awarded two Grounds Development Awards: £300 each.
- Gave two top-ups of £50 each to 2 other Grounds Development Awards supported by the Rakusen Bequest to increase the total of those awards up to £300 each.
- Offered and awarded 5 sets of children's gardening gloves, each of 30 pairs: £538.57.

#### **Membership and Engagement: Vicky Price and Madalyn Hughes**

The work of the Trust is dependent on our members both for income, through membership fees and events, and for the time and skills of those who volunteer to deliver our activities, often foregoing expenses. The Trust's membership also includes much expertise on the conservation of historic parks and gardens.

The Trust keeps in touch with our members via our website, our hard-copy and e-Newsletters, email updates and has a presence on Twitter.



## YORKSHIRE GARDENS TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021

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At the year-end the Trust's membership consisted of:

Category of membership	Number of memberships
Life	25
Annual double	69
Annual single	119
Association	2
Corporate	1
Student	6
School	52
Honorary life	1
Honorary annual single*	21
Honorary annual double	14
Total memberships	310

\* Honorary memberships include event hosts who are given one year's honorary membership, and researchers whilst they work for the Trust.

New members are recruited via the website, social media, the membership brochure, talks given by Trustees and by word-of-mouth.

Our Newsletters, hard copy and virtual, were packed full of interesting and informative detail this year, capably edited by Christine Miskin. Thanks to the expertise of our members, the newsletters have not been short of copy due to the lack of events reports, with reviews of on-line talks and books; *Discovering North Yorkshire Historic Gardens through the Archives* by Gail Falkingham and *Cornfield Flowers* by Penelope Dawson-Brown.

We had hoped (again) to hold the AGM at Bramham Hall on Saturday March 26<sup>th</sup>, by kind permission of Nick and Rachel Lane Fox, with lunch and a talk by David Jacques, garden and landscape historian and author, as well as a tour of the designed garden. Covid-19 struck again and we were forced to hold a virtual AGM.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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Events are central to the reasons many members join us and are active with us, which always places a particular responsibility upon the events committee, especially so during a period when meetings are difficult. The team has faced this situation magnificently, planning, re-planning and devising new approaches to cope with the pandemic as it was anticipated and as it was in practice. The Events Committee delayed the start of the programme till June, carrying some events over to 2022. As it turned out they had to work around a further delay to the ending of restrictions by organising a visit to Professor Alastair Fitter's garden in York on June 9<sup>th</sup>, where 41 visitors, were welcomed in 2 sessions. We agreed with Scampston Hall Garden that it would be inappropriate to hold the Summer Evening Party in the walled garden in late June, but a more mobile and easily distanced visit to Cantley and the Summer Picnic at Norton Conyers were able to proceed. Once past July 19<sup>th</sup>, when all restrictions on gatherings were lifted, it was easier to organise and hold events as planned, so visits to gardens in Durham, and Old Durham Gardens which have been restored by the Friends of Old Durham Gardens, and to Rowntree Park in York (celebrating its centenary), and some less well-known gardens in central York, and to Cusworth Hall, were all able to take place.

We collaborated with the Gardens Trust to host a number of lectures using the Zoom platform, and their positive reception has enabled us to conclude that online events should be a regular feature of YGT's communication, education and entertainment activity. Collaborating with other organisations creates a great interface between YGT volunteers and members of the public we don't usually meet.

Next year we look forward to celebrating the 25<sup>th</sup> Anniversary of the Trust with special events and editions of the newsletter planned. We also hope that a safe ending to the Covid-19 pandemic restrictions will enable a full programme of events to take place.

#### **Finance**

The Trust recorded a surplus for the year of £2,161, (2020: deficit £758). This movement in funds is largely attributable to events income exceeding requests for grants during the year. The finances of the Trust are in good shape, in part due to the legacy of one of our founders, Phillipa Rakusen. The Trust's assets are held in cash or short-term deposit at the bank.

Insurance, including professional indemnity and public liability insurance, is in place through the Gardens Trust.

#### **Financial Reserves Policy**

The Trust aims to retain enough reserves to further the aims of the Trust and secure our future. The Trust has sufficient funds to continue our work for the foreseeable future and in accordance with the Business Plan.

A Reserves Policy is in place as follows.

A minimum reserve of £10,000 should be maintained, which should be reviewed on an annual basis. If required, this should ensure that YGT could continue to operate for a reasonable period should income fall below that needed to sustain its activities, to allow for an orderly winding up should it not be able to continue operation and pay contingent liabilities should these arise.

Current reserves are significantly in excess of the recommended minimum reserve as a result of a receipt of a significant generous legacy. Trustees will continue to consider disbursement of these funds, in accordance with the charitable objectives of YGT namely:

- to promote the education of the public on matters connected with garden land.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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- to promote the protection, conservation and appropriate treatment of whatever garden land may exist or have existed in and around the counties of North Yorkshire, South Yorkshire, East Yorkshire and West Yorkshire for the education and enjoyment of the public.

#### **Archives**

The Trust has established an archive at the Borthwick Institute for Archives, University of York. There are regular deposits of records covering the spectrum of our activities in hard copy and digital formats, which are available for public use. The archive finding aid can be consulted online, here: <https://borthcat.york.ac.uk/index.php/ykgt>.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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#### **STRUCTURE, GOVERNANCE AND MANAGEMENT**

##### **Organisational structure and management**

The Trust is managed by the Council of Management. The Council comprises the Trustees, who are directors of the Trust and are charity Trustees for purposes of charity law. The Council met 4 times in the year by Zoom. Questions, policy and strategy are usually decided by consensus, but decided by a majority vote if required.

The Trustees delegate some activities to sub-committees, which meet according to need. Each sub-committee comprises Trust members and non-member professionals and partners, and has at least one Trustee as a member or a designated link Trustee. The Trustee reports on the work of their sub-committee to the Council, which discusses proposals and makes decisions. The Trustee reports back to the sub-committee, which also receives the minutes of the Council.

Each sub-committee submits a budget request annually via the treasurer for approval by the Council before the start of each financial year.

The Council seeks professional help when required from our accountants, UHY Calvert Smith LLP, who are the independent examiner of the Trust's accounts, and from our lawyers, Wrigleys Solicitors LLP. Information from the Charity Commission is also circulated to Trustees.

The Trust engages a self-employed administrator to help with the organisation and recording of meetings, membership and other administrative matters. The work is unevenly spread over the year, but averages around four hours per week.

The Trust is a member of the Gardens Trust and sends a voting delegate to the AGM. Delegates also attend other Gardens Trust meetings. Through the Gardens Trust, the Trust is a member of Heritage Alliance, the national body for organisations concerned with the historic environment.

Members are entitled to attend and vote at the AGM. The 24<sup>th</sup> AGM was held virtually on 27<sup>th</sup> March 2021. The next AGM is to be held on Saturday 26<sup>th</sup> March at Bramham Park.

##### **Trustees, and recruitment, appointment and training of new Trustees**

One third of the Trustees must retire at each AGM, and retiring Trustees may be re-elected. At the 2021 AGM Nigel Tooze retired as Trustee and Treasurer, while Maddy Hughes and Penelope Dawson-Brown retired by rotation and were re-appointed. We were delighted to welcome Chris Beevers and Roger Lambert as new Trustees this year.

New Trustees are provided with the Articles of Association and the Charity Commission's "Charity Trustee Welcome Pack" and "Guidance to Trustees", and are asked to sign our standard Trustee Eligibility Declaration. Mentoring is also provided by existing Trustees.

## YORKSHIRE GARDENS TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2021

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#### REFERENCE AND ADMINISTRATIVE DETAILS

**Registered Company number**

03256311 (England and Wales)

**Registered Charity number**

1060697

**Registered office**

Heritage House  
Murton Way  
Osballdwick  
York  
North Yorkshire  
YO19 5UW

**Trustees**

The subscribers to the Memorandum and Articles of Association (The Council of Management) who held office during the year were as follows:-

Penelope Dawson Brown	Conservation, Archives, Schools Education
Gail Falkingham	Conservation
Val Hepworth	Conservation, Events
Madalyn Joy Hughes	Events, Membership & Engagement, Honorary Treasurer
Vicky Price	Events, Membership & Engagement
Nigel Tooze	Honorary Treasurer (resigned 27 March 2021)
Patricia Gore	Events, Bursary Scheme Oversight
Christopher Charles Webb	Chairman
Roger Charles Lambert	Conservation (appointed 27 March 2021)
Christine Beevers	Student Bursary, Events, Research and Recording (appointed 27 March 2021)

The Charity Trustees are the current Directors of the limited company. There is a vacancy for a Vice Chairman to the Council. Some Council meetings have been attended by Vice-presidents Peter Goodchild and Nick Lane Fox. Mrs Louise Amende has continued her remunerated role as Administrator for Events bookings, Membership Secretary and assisting the Council, due to the continued lack of further volunteers.

**Independent examiner**

UHY Calvert Smith  
Chartered Accountants  
Heritage House  
Murton Way  
Osballdwick  
York  
YO19 5UW

**Solicitors**

Wrigleys  
19 Cookridge Street  
Leeds LS2 3AG

**Bankers**

Yorkshire Bank  
46 Coney Street  
York YO1 1NQ  
  
Aldermore Bank  
1st Floor, Block B  
Western House  
Lynch Wood  
Peterborough PE2 6FZ

**YORKSHIRE GARDENS TRUST**

**REPORT OF THE TRUSTEES  
FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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This report has been prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small companies.

Approved by order of the board of trustees on 16 February 2022 and signed on its behalf by:

Mr Christopher Charles Webb - Trustee

# INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF YORKSHIRE GARDENS TRUST

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I report on the accounts for the year ended 30 September 2021 set out on pages fourteen to twenty-four.

## **Responsibilities and basis of report**

As the charity trustees of the company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your company's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

## **Independent examiner's statement**

I have completed my examination. I confirm that no 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 company as required by section 386 of the 2006 Act;  
or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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.

Mr Harry P Howley  
ICAEW  
UHY Calvert Smith  
Chartered Accountants  
Heritage House  
Murton Way  
Osbalwick  
York  
YO19 5UW

16 February 2022

**YORKSHIRE GARDENS TRUST**

**STATEMENT OF FINANCIAL ACTIVITIES  
(INCORPORATING AN INCOME AND EXPENDITURE ACCOUNT)  
FOR THE YEAR ENDED 30 SEPTEMBER 2021**

	Notes	Unrestricted Funds £	Restricted Funds £	2021 Total funds £	2020 Total funds £
<b>INCOME FROM</b>					
Donations and legacies	3	<b>7,720</b>	<b>100</b>	<b>7,820</b>	6,289
<b>Charitable activities</b>					
Functions, events	4	<b>5,157</b>	-	<b>5,157</b>	789
Investment income	5	<b>1,103</b>	-	<b>1,103</b>	814
<b>Total</b>		<b>13,980</b>	<b>100</b>	<b>14,080</b>	7,892
<b>EXPENDITURE ON</b>					
<b>Charitable activities</b>					
Functions, events	4	<b>(1,673)</b>	-	<b>(1,673)</b>	(657)
Grants, donations	5	<b>(4,459)</b>	-	<b>(4,459)</b>	(2,413)
Support costs	6	<b>(5,707)</b>	<b>(80)</b>	<b>(5,787)</b>	(5,580)
<b>Total</b>		<b>(11,839)</b>	<b>(80)</b>	<b>(11,919)</b>	(8,650)
<b>NET INCOME/ (EXPENDITURE)</b>		<b>2,141</b>	<b>20</b>	<b>2,161</b>	(758)
<b>RECONCILIATION OF FUNDS</b>					
<b>Total funds brought forward</b>		<b>69,758</b>	<b>3,599</b>	<b>73,357</b>	74,115
<b>TOTAL FUNDS CARRIED FORWARD</b>		<b>71,899</b>	<b>3,619</b>	<b>75,518</b>	73,357

The notes form part of these financial statements



**YORKSHIRE GARDENS TRUST (REGISTERED NUMBER: 03256311)**

**BALANCE SHEET  
AT 30 SEPTEMBER 2021**

	Notes	Unrestricted Funds £	Restricted Funds £	2021 Total funds £	2020 Total funds £
<b>FIXED ASSETS</b>					
Tangible assets		-	-	-	-
<b>CURRENT ASSETS</b>					
Debtors	12	2,517	-	2,517	1,025
Cash at bank		76,726	3,619	80,345	78,258
<b>Total</b>		<b>79,243</b>	<b>3,619</b>	<b>82,862</b>	<b>79,283</b>
<b>CREDITORS</b>					
Amounts falling due within one year	13	(7,344)	-	(7,344)	(5,926)
<b>NET CURRENT ASSETS</b>		<b>71,899</b>	<b>3,619</b>	<b>75,518</b>	<b>73,357</b>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		<b>71,899</b>	<b>3,619</b>	<b>75,518</b>	<b>73,357</b>
<b>NET ASSETS</b>		<b>71,899</b>	<b>3,619</b>	<b>75,518</b>	<b>73,357</b>
<b>FUNDS</b>					
Unrestricted funds	15			71,899	69,758
Restricted funds				3,619	3,599
<b>TOTAL FUNDS</b>				<b>75,518</b>	<b>73,357</b>

The notes form part of these financial statements

continued...

**YORKSHIRE GARDENS TRUST (REGISTERED NUMBER: 03256311)**

**BALANCE SHEET – CONTINUED  
AT 30 SEPTEMBER 2021**

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The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 30 September 2021.

The members have not required the charitable company to obtain an audit of its financial statements for the year ended 30 September 2021 in accordance with Section 476 of the Companies Act 2006.

The trustees acknowledge their responsibilities for

- (a) ensuring that the charitable company keeps accounting records that comply with Sections 386 and 387 of the Companies Act 2006 and
- (b) preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

These financial statements have been prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small charitable companies.

The financial statements were approved by the Board of Trustees on 16 February 2022 and were signed on its behalf by:

Mr Christopher Charles Webb - Trustee

Mrs Madalyn Joy Hughes - Trustee

## YORKSHIRE GARDENS TRUST

### NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 30 SEPTEMBER 2021

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#### 1. CHARITY INFORMATION

Yorkshire Gardens Trust is a private charitable company, limited by guarantee, registered with the Charity Commission in England and Wales.

The address of its registered office is Heritage House, Murton Way, Osbaldwick, York, YO19 5UW.

#### 2. ACCOUNTING POLICIES

##### **Basis of preparing the financial statements**

The financial statements of the charitable company, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (effective 1 January 2019)', the Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Companies Act 2006. The financial statements have been prepared under the historical cost convention.

##### **Income**

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

##### **Expenditure**

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Grants offered subject to conditions which have not been met at the year end date are noted as a commitment but not accrued as expenditure.

##### **Tangible fixed assets**

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Plant and machinery etc	- 15% on reducing balance
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##### **Taxation**

The charity is exempt from corporation tax on its charitable activities.

##### **Fund accounting**

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

**YORKSHIRE GARDENS TRUST****NOTES TO THE FINANCIAL STATEMENTS - CONTINUED  
FOR THE YEAR ENDED 30 SEPTEMBER 2021****3. DONATIONS AND LEGACIES**

	2021	2020
	£	£
Members subscriptions	4,402	4,969
Legacies	2,000	-
Gift Aid	717	925
Donations	701	395
	<u>7,820</u>	<u>6,289</u>

**4. INCOME FROM CHARITABLE ACTIVITIES**

	2021	2020
	£	£
Functions, events income	5,157	789
Functions, events costs	(1,673)	(657)
Functions, events surplus	<u>3,484</u>	<u>132</u>

**5. INVESTMENT INCOME**

	2021	2020
	£	£
Deposit account interest	<u>1,103</u>	<u>814</u>

**6. GRANTS PAYABLE**

	2021	2020
	£	£
Grants, donations	<u>4,459</u>	<u>2,413</u>

The total of grants paid during the year was:

	2021	2020
	£	£
Schools Project	2,484	1,287
Broomhill Community Trust, Sheffield – historic garden restoration	1,000	-
Digitisation of a model of a significant "Backhouse" rockery	350	-
Valley Gardens Harrogate to support publication of "A Souvenir Guide to Valley Gardens"	-	500
To support research for a book about Thomas White	625	126
National Trust to support a family day at Nunnington Hall	-	500
	<u>4,459</u>	<u>2,413</u>

In addition to the grants paid during the year, grant offers totalling £600 (2020: £1,624) have been made, which will become due when specific conditions are met by the beneficiaries.

**YORKSHIRE GARDENS TRUST**

**NOTES TO THE FINANCIAL STATEMENTS - CONTINUED  
FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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**7. SUPPORT COSTS**

	<b>2021</b>	2020
	<b>£</b>	£
Secretary costs	<b>1,344</b>	2,072
Accountancy	<b>703</b>	683
Printing, postage and stationery	<b>2,182</b>	1,192
Research	<b>80</b>	202
Affiliations	<b>640</b>	566
Insurance	<b>260</b>	260
Computer costs and licences	<b>204</b>	-
Advertising	<b>215</b>	360
Marketing for events	<b>159</b>	-
Room hire	-	130
Travel expenses	-	99
Bank charges	-	16
	<b><u>5,787</u></b>	<u>5,580</u>

## YORKSHIRE GARDENS TRUST

### NOTES TO THE FINANCIAL STATEMENTS - CONTINUED FOR THE YEAR ENDED 30 SEPTEMBER 2021

#### 8. NET INCOME/(EXPENDITURE)

Net income/(expenditure) is stated after charging/(crediting):

	2021	2020
	£	£
Accountancy and Independent Examination	<u>703</u>	<u>683</u>

#### 9. TRUSTEES' REMUNERATION, BENEFITS AND EXPENSES

There were no trustees' remuneration, benefits or expenses for the year ended 30 September 2021 or for the year ended 30 September 2020.

#### 10. STAFF COSTS

There were no individuals employed by the charity during the current or prior year.

#### 11. COMPARATIVE FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted Funds £	Restricted Funds £	Total funds £
<b>INCOME FROM</b>			
Donations and legacies	5,869	420	6,289
<b>Charitable activities</b>			
Functions, events	789	-	789
Investment income	814	-	814
<b>Total</b>	<u>7,472</u>	<u>420</u>	<u>7,892</u>
<b>EXPENDITURE ON</b>			
<b>Charitable activities</b>			
Functions, events	(657)	-	(657)
Grants, donations	(2,413)	-	(2,413)
Support costs	(5,425)	(155)	(5,580)
<b>Total</b>	<u>(8,495)</u>	<u>(155)</u>	<u>(8,650)</u>
<b>NET INCOME/ (EXPENDITURE)</b>	<u>(1,023)</u>	<u>265</u>	<u>(758)</u>

**YORKSHIRE GARDENS TRUST**

**NOTES TO THE FINANCIAL STATEMENTS - CONTINUED  
FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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**11. COMPARATIVE FOR THE STATEMENT OF FINANCIAL ACTIVITIES – continued**

**RECONCILIATION OF FUNDS**

<b>Total funds brought forward</b>	70,781	3,334	74,115
<b>TOTAL FUNDS CARRIED FORWARD</b>	<u>69,758</u>	<u>3,599</u>	<u>73,357</u>

**12. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
Other debtors	<u>2,517</u>	<u>1,025</u>

**13. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
Other creditors and deferred income	<u>7,344</u>	<u>5,926</u>

**14. DEFERRED INCOME**

Included within creditors falling due within one year is a total of £6,391 (2020: £5,030) in relation to deferred income.

£3,371 (2020: £4,310) of this amount relates to income from events that were required to be cancelled, as a result of COVID-19 pandemic restrictions. A refund is due to be offered to the customers concerned, while some amounts may be retained by the charity, if these individuals offer that the charity retain the relevant amounts as donations to unrestricted funds.

The remaining £3,020 (2020: £720) relates to events that either occurred or are scheduled to occur within one year of the year-end date.

YORKSHIRE GARDENS TRUST

NOTES TO THE FINANCIAL STATEMENTS - CONTINUED  
FOR THE YEAR ENDED 30 SEPTEMBER 2021

15. MOVEMENT IN FUNDS

	At 30/9/20 £	Net movement in funds £	At 30/9/21 £
<b>Unrestricted funds</b>			
General fund	69,758	2,141	71,899
	<u>69,758</u>	<u>2,141</u>	<u>71,899</u>
<b>Restricted funds</b>			
North Yorkshire County Council	251	(80)	171
Horticultural Student Bursary	3,348	100	3,448
	<u>3,599</u>	<u>20</u>	<u>3,619</u>
<b>TOTAL FUNDS</b>	<u><u>73,357</u></u>	<u><u>2,161</u></u>	<u><u>75,518</u></u>

Net movement in funds in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	13,980	(11,839)	2,141
	<u>13,980</u>	<u>(11,839)</u>	<u>2,141</u>
<b>Restricted funds</b>			
North Yorkshire County Council	-	(80)	(80)
Horticultural Student Bursary	100	-	100
	<u>100</u>	<u>(80)</u>	<u>20</u>
<b>TOTAL FUNDS</b>	<u><u>14,080</u></u>	<u><u>(11,919)</u></u>	<u><u>2,161</u></u>



**YORKSHIRE GARDENS TRUST**

**NOTES TO THE FINANCIAL STATEMENTS - CONTINUED  
FOR THE YEAR ENDED 30 SEPTEMBER 2021**

**15. MOVEMENT IN FUNDS – continued**

**Comparatives for movement in funds**

	At 30/9/19 £	Net movement in funds £	At 30/9/20 £
<b>Unrestricted funds</b>			
General fund	70,781	(1,023)	69,758
	<u>70,781</u>	<u>(1,023)</u>	<u>69,758</u>
<b>Restricted funds</b>			
North Yorkshire County Council	406	(155)	251
Horticultural Student Bursary	2,928	420	3,348
	<u>3,334</u>	<u>265</u>	<u>3,599</u>
<b>TOTAL FUNDS</b>	<u><u>74,115</u></u>	<u><u>(758)</u></u>	<u><u>73,357</u></u>

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	7,472	(8,495)	(1,023)
	<u>7,472</u>	<u>(8,495)</u>	<u>(1,023)</u>
<b>Restricted funds</b>			
North Yorkshire County Council	-	(155)	(155)
Horticultural Student Bursary	420	-	420
	<u>420</u>	<u>(155)</u>	<u>265</u>
<b>TOTAL FUNDS</b>	<u><u>7,892</u></u>	<u><u>(8,650)</u></u>	<u><u>(758)</u></u>

**Restricted funds**

A grant of £1,500 was received in 2015 from North Yorkshire County Council with stipulation that the grant be applied for research and recording purposes only.

In 2017 the Trust established a Horticultural Student Bursary which is available to any under- or post-graduate student who is attending a Further Education College or University in Yorkshire and is studying either horticulture, landscape design, landscape/garden history or the conservation of historic designed landscapes.

**YORKSHIRE GARDENS TRUST**

**NOTES TO THE FINANCIAL STATEMENTS - CONTINUED  
FOR THE YEAR ENDED 30 SEPTEMBER 2021**

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**16. RELATED PARTY DISCLOSURES**

There were no related party transactions during this or the prior year.