

**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 2023  
FOR  
YORKSHIRE GARDENS TRUST**

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

**YORKSHIRE GARDENS TRUST**

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FOR THE YEAR ENDED 30 SEPTEMBER 2023**

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## YORKSHIRE GARDENS TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2023

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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.

#### 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 many fronts in pursuit of our 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	Historic England and English Heritage
The Folly Fellowship	Natural England
The Gardens Trust	York Civic Trust
Other County Garden Trusts	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
Royal Horticultural Society	Northern Horticultural Society

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
- Small grants
- Bursary
- Membership and Engagement
- Events

## ACHIEVEMENTS AND PERFORMANCE

### HIGHLIGHTS OF THE YEAR: Chris Webb

One of the best aspects of YGT is how all the parts work effectively, smoothly and positively without much recourse to guidance from the centre: devolution, collaboration and co-operation at their best, driven by hard-working, enthusiastic and knowledgeable volunteers. It is a joy to learn from, and work alongside such an impressive team. Our annual report sets out the range of YGT's activities in detail. Here I draw attention to particular aspects of our work.

Volunteering is at the heart of what we do, enabling all our activities. We are pleased to welcome the new volunteers who have joined us in the year, glad to recognise the contributions of those who continue to make YGT as effective as it is, and sorry to lose those who, for a host of understandable reasons, need to step away from active volunteering. We thank Gail Falkingham in particular for her stint as a Trustee since 2019. Gail's skill set and knowledge has enabled YGT to expand its outreach activities through Instagram. Her background as an archaeologist and her employment at the North Yorkshire County Record Office continues to be enormously helpful to us: her curation of exhibitions there, based on material used to research YGT sites, has been a significant outreach success. In the summer we said goodbye to our administrator Lucy Bennett, who, we are pleased to report, gained full time permanent employment with St Leonard's Hospice in York; and we welcomed Lynn Watkinson as her replacement.

#### *Research and Recording*

The Research and Recording team led by Louise Wickham has taken advantage of the resumption of the normal operation of archive services this year, and has produced reports on six sites, all of which can be read on our website. Moreover, broadening the scope of research to cover sites across the county allows researchers wider choice, and enables different ways of approaching research; for example, focussing on the work of a particular designer.

Research's close link to Conservation and Planning has borne especial fruit, responding to planning applications submitted for previously-unresearched sites: Owston Hall near Doncaster is one example.

#### *Conservation and Planning*

As usual, with Val Hepworth leading, the volunteers who work hard and long at the many significant planning applications that come our way have covered a wide geographical, chronological and stylistic range of gardens and designed landscapes.

The National Trust's application to build a new visitor centre inside the World Heritage site at Studley Royal stands out for its significance and difficulty. YGT received a great deal of informed advice to help us formulate our response, and readers of our Newsletters will know that, after reading the thousands of words, viewing the many plans and illustrations, and attending meetings, we concluded that the case for a new visitor centre in that location had not met the criteria laid down for such a large intervention on the site within the Canal Gates. In reaching that conclusion we acknowledge that it is necessary to balance the preservation of the site's qualities of Outstanding Universal Value against the requirement to ensure that the site is sustainable in every way. The application has drawn many responses, in favour, against, and partly the one or the other. Our sister organisation, the Gardens Trust, concluded on balance that the proposal should go ahead. In contrast, ICOMOS-UK (International Council on Monuments and Sites), which has a special role as adviser to the UNESCO World Heritage Committee on cultural World Heritage sites, sees the application in the same light as YGT. No-one can predict the outcome of the Studley Royal application; whatever the outcome, it will be an important decision for all of us.

**REPORT OF THE TRUSTEES  
FOR THE YEAR ENDED 30 SEPTEMBER 2023**

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It is the first time that GT and YGT have reached different conclusions on a planning matter of such importance. Our difference of opinion is, however, amicable, and we continue to work closely with GT on the whole range of planning applications affecting designed landscapes in Yorkshire, as well as the many other areas in our mutual interest.

We have noticed growing numbers of consultations about solar and wind electricity generation projects in relation to parks and gardens, and we expect these to grow further as the imperative to convert power generation away from fossil fuels gathers pace. In this area of planning, we might see a developing need for planners to compromise in favour of generation projects at the expense of porous boundaries of registered parks and gardens.

*Bursary scheme*

Led by Chris Beevers, our Bursary programme has had a remarkably successful year, following hard work in redrawing our application process and criteria. The scheme benefited from featuring in our new YGT Instagram account, in our newsletters and e-bulletins (both available online) and from fliers circulated at YGT events such as the Study Day at Burnby Hall Gardens. YGT, through Chris, offered wider support and encouragement beyond the Bursary itself; Chris maintained contact with the students throughout their projects, and gave them a final feedback and evaluation interview; we invited Rachel Higgins to our AGM, and asked her to give an update on her work at that point; and a visit to RHS Tatton was an opportunity to meet Sarah Collings to see and discuss her work in the space it was created for.

*Schools*

Led by Sue Lindley, Schools membership of YGT has grown significantly during the financial year, from 54 schools in October 2022 to 76 in September 2023. We very much hope to be able to increase the amount of funding we can devote to this area of YGT's work, which is so important in giving practical effect to important teaching that might otherwise remain theoretical.

*Membership and Events*

Despite the pressures on household budgets, our membership numbers have held up well compared to other membership organisations of our scope and scale. This must in part be due to the activities of the Events group, led by Vicky Price and Maddy Hughes. With their committee they organised a full programme of events (to which we welcomed members and guests), including visits to historic landscapes, designed modern gardens and parks across the breadth of Yorkshire. The visit to Newburgh Priory illustrated the value of our connection with North Yorkshire County Record Office, where historic estate plans were displayed for us before a visit to the Priory. In the autumn we curated a stand at the Harrogate Autumn Flower Show at Newby Hall, a new and different venture for YGT.

*Finance*

The most important point to note about our finances is that they are sound, able to support our continued existence despite the difficult economic climate. Members of Council and of its sub-committees are grateful to our Treasurer, Maddy Hughes, for continuing to administer and manage our financial affairs so efficiently; straightforward financial management makes a critical contribution to the smooth running of YGT.

In the last 25 years YGT has developed to a position where our work and achievements are admired and respected by fellow county garden trusts and colleagues throughout the worlds of conservation and 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 everyone who gives their time and skills so generously.



## **OUR PRINCIPAL ACTIVITIES**

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

Our team of 15 volunteers has been able to work normally once again this year following the disruption to archive services over the past two years. As a result, we have completed reports on a further six sites, which have been added to our online database. There are 12 sites currently being researched, most of which will be completed in 2024. We have broadened our scope to include designed landscapes across Yorkshire, so that volunteers have more choice in what to research. This enables them to focus, for example, on the work of a particular designer. Working closely with the Conservation team, we have been able to respond when planning applications have been submitted for previously unresearched sites, for example Owston Hall near Doncaster.

We hold quarterly team meetings, of which three are online where we also have a short training session. The first of these was by YGT Chair, Chris Webb, who discussed land tenure records and their use. On the 26 June, we headed to Kiplin Hall in North Yorkshire for our second annual training visit. The aim of the day was to help volunteers with site recording, specifically identifying features on the ground and understanding the historic layers. The day was divided into two, with the morning spent looking at features in the wider landscape and the afternoon concentrated on the walled kitchen garden and adjacent gardens.

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

Our Conservation and Planning sub-committee meetings took place in October, January, April and July; all on Zoom as logistically it is easier for members who are scattered across Yorkshire and does not incur meeting room costs or travel time. There are some disadvantages, however, in not meeting in person; reduced social bonding, sharing of ideas and tea and cake! So, I hope that we may revert to having some meetings in person next year.

At full-strength we have eight members but much of the regular statutory consultee work is carried out by a core group with a breadth of expertise and local knowledge. In addition, we call on several YGT members who are not on the sub-committee but have particular knowledge and expertise.

Dr Margaret Nieke, Senior Historic Environment Specialist with Natural England (and YGT member) is a valuable and regular attendee at our meetings giving us a wider dimension and knowledge for our work. Chris Mayes, the North of England Landscape Architect for Historic England, who is an invaluable guide and fount of knowledge, is now National Landscape Adviser for Historic England. We remain without his regional replacement.

A new YGT Conservation and Planning chairman has not been found. In the meantime, Chris Webb chairs the meetings, Geoff Hughes assists with the agenda and Roger Lambert takes the minutes. As Chris can make site visits in York, he now responds to City of York planning consultations and also led on the National Trust consultations for Beningbrough and Studley Royal Canal Gates. Val Hepworth continues writing most of the other planning responses and the responses to the Forestry Commission consultations, with help from the team.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2023**

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YGT Conservation and Planning works closely with the part-time Conservation Officers at the Gardens Trust, the statutory consultee for Registered Parks and Gardens. The Gardens Trust sends YGT weekly details of relevant planning applications. We now also receive applications sent to the Gardens Trust by the Joint Committee of the National Amenity Societies' (JCNAS) casework log. Sometimes the JCNAS notifications are of relevant applications that have not been sent to GT by the Local Planning Authority. One such case in June was for the partial demolition, rebuilding and realignment of part of the listed historic boundary wall of the Wentworth Woodhouse Estate, which attaches to the parkland's south-east entrance by the East Lodge. YGT is also consulted on planning applications relating to non-registered sites. The research knowledge of YGT's Research and Recording group is often invaluable in such cases, e.g. for Owston Hall and High Melton Hall near Doncaster. These are on the City of Doncaster's Local List of Historic Parks and Gardens, but not the Historic England Register. In addition to the Gardens Trust, all YGT's responses are notified to Historic England.

Since inception YGT has built up considerable specialist knowledge which is invaluable in our efforts to conserve Yorkshire's historic parks and gardens. Development pressures within historic parks and gardens and on their setting remain a constant issue: not unexpectedly we are being increasingly consulted about solar and wind electricity generation projects in relation to parks and gardens. Whatever the nature or extent of an application, understanding it and writing a response requires a great deal of volunteer time.

This year we have responded to about 125 planning applications, including fairly frequently being reconsulted for advice on amendments. We have had some 19 woodland and Forestry Commission consultations, an increase of three on the previous year. In addition to felling, often necessary because of diseased trees or as part of a woodland management plan, we have advised on tree planting and woodland creation. This includes the planting of replacement tree species that have been scientifically researched and extrapolated as more likely to withstand climate change in the longer term. Sadly, we have had consultations on Statutory Plant Health Notices and biosecurity measures for Bretton Hall and Wentworth Castle, due to the disease *Phytophthora ramorum* attacking rhododendrons; we remain concerned about the future for the special rhododendron collections at these sites.

Win Derbyshire and Roger Lambert are continuing to analyse the relationship between our responses and planning outcomes as decided by planning authorities; our planning responses can be seen online on the relevant planning authority's website and, thanks to Geoff Hughes, as a convenient group on our website.

YGT's planning and conservation work also includes site visits and special meetings. This year such occasions included visits with the National Trust at Beningbrough and Studley Royal, with officers of Leeds City Council at Temple Newsam and Lotherton, with Harewood Estate regarding their parkland restoration proposals and with Harewood House Trust regarding their new plans for the gardens. We also met developers and conservation officers such as at High Melton Hall, near Doncaster, Friends groups such as Pontefract's Friarwood Valley Gardens and in the case of Ripon Cathedral's plans, Ripon Civic Society and interested YGT members.

Historic England consult YGT regarding proposed Yorkshire additions to the Register. This year we were consulted about Waterton Park (formerly Walton Hall Estate), Walton Wakefield. At the time of writing the Park and its surrounding wall are still under consideration for adding to the Register at Grade II.

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

A group of trustees has reworked the criteria and process for small grants, rendering them simpler and more straightforward. During the year, however, no applications resulted from enquiries. There are positive signs that the work of reform will bear fruit in the coming year.



### **Landscape and Horticultural Student Bursary: Chris Beevers**

The Bursary Scheme has continued its momentum from the previous year with increased enquiries. Two grants were awarded, and a third application agreed for next year. There has been no targeted promotion of the YGT Bursary this year across the Yorkshire region's further and higher education institutions. However, the scheme has featured regularly in YGT's Instagram account and newsletters and e-bulletins, both available online. Fliers were circulated at YGT events such as the Study Day at Lotherton and the visit to Burnby Hall Gardens. There has also been the additional advantage of recommendations from previous recipients.

#### ***Applications and awards***

In 2023 YGT received eight expressions of interest in the Bursary, seven from students and one from a former partner organisation. Askham Bryan College expressed interest in the scheme as part of its initiative to encourage students to choose horticulture as a career. Of the seven student enquiries:

- One was from a student studying for a master's in landscape design and architecture.
- Two were from students seeking support for horticultural training RHS levels 2 and 3 courses.
- Two were from students enrolling in garden design courses.
- One was from a student with an interest in forestry.
- One was from a student with a specialist interest in heritage fruit.

Five of the above were enrolling on courses because of a change in career direction. Of the seven enquiries, three translated into full applications and were awarded YGT bursaries. Rachel Higgins and Sarah Collings received funding and were both career change students. Rachel completed her RHS level 2 practical course, with a work placement at an historic garden. Sarah designed a border exhibited at RHS Tatton on the sensory nature of plants and was awarded a bronze medal. Last year's YGT Bursary recipient Camellia Hayes was invited to return to RHS Tatton for the Young Designer of the Year competition and received a second silver medal. Julie Fern's application to the Bursary to support her RHS level 3 course has been approved and will be funded out of the budget for 2023-24. Julie is an experienced professional gardener who is extending her skills and knowledge to work in historic parks and gardens in York.

A total of £1,973 has been awarded to the Bursary recipients who completed their projects in 2022. Funding was used for course fees and plants.

#### ***Scheme administration***

Now in its second year, the sub-group's process for reviewing applications against the scheme's criteria has run smoothly. The distinct perspective of each member of the group is invaluable in achieving effective and consistent decision making. The successful financial administration of the Bursary by YGT's Treasurer is much appreciated by both students and their respective providers.



**REPORT OF THE TRUSTEES  
FOR THE YEAR ENDED 30 SEPTEMBER 2023**

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***Monitoring, feedback and evaluation***

Contact was maintained with the Bursary students throughout their projects, with a final feedback and evaluation interview. Wider support and encouragement are offered by YGT beyond being solely a funding body. Rachel Higgins was invited to the YGT AGM, giving an update on her work at that point. This was especially useful for the wider YGT membership to be aware of the benefits of the Trust's charitable activity that their membership supports. A visit to RHS Tatton was an opportunity to meet Sarah Collings and see and discuss her work in the space it was created for.

**Schools and education: Sue Lindley**

Through the Schools sub-committee, the Trust supports, advises, and channels funds to our 76 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. School membership of YGT has grown significantly during the financial year, from 54 schools in October 2022 to 76 in September 2023.

During the 2022/23 financial year the Schools sub-committee:

- Offered bags of 16 miniature narcissi to all schools; 34 schools took up the offer: £467.16.
- Offered the book 'Pedro Loves saving the Planet' by Jess French to all schools; 35 schools took the offer up: £384.65.
- Awarded four Grounds Development Awards: £1,200
- Awarded £300 towards a school visit to Sheffield Botanical Garden: in the end, unclaimed.
- Offered log planters to all schools; 31 schools took up the offer: £1,484.63.
- Gave 24 welcome gifts of tools or ladybird towers to new school members: £539.52 (including £243.43 carried over from a previous year's budget).
- Organised the design, printing and supply of book plates to accompany the above book and future books: £32.
- Information on Garden Recycling and on Green Manure was emailed to all schools and added to the website during the academic year 22/23.

**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.

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

## YORKSHIRE GARDENS TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2023

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

Category of membership	Number of memberships 2022-23	Number of memberships 2021-22	Increase/decrease
Life	25	25	0
Annual double	71	70	+1
Annual single	112	118	-6
Association	2	2	0
Corporate	1	1	0
Student	4	6	-2
Student honorary	1	N/a	N/a
Student free	1	N/a	N/a
School	76	54	+22
Honorary life	3	1	+2
Honorary annual single*	26	31	-5
Honorary annual double*	10	14	-4
Total memberships	332	322	+10

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

Members are able to engage with YGT through our events, our website, social media – Instagram and X (Twitter) – and our newsletters. Our website has been designed for members and non-members to easily find information about all the Trust's activities. Members have received four editions of our newsletter, two hard copies and two e-newsletters during the year, which Christine Miskin, the editor, packed with reports of visits, articles and information about the work of the Trust. The newsletter is also available to read on our website.

**REPORT OF THE TRUSTEES  
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The Events committee organised a full programme of events for members and their guests in 2023, with the aim to include visits to historic landscapes, designed modern gardens and parks across the breadth of Yorkshire, starting with a visit in February to Mike Myers' Garden at Smelthouses to see his display of snowdrop varieties and early spring flowers. Our AGM was held at Sledmere House and Gardens, followed by a talk about the making of the landscape there by David Neave, who led a tour of the garden. In April there were visits to Valley Gardens, a public park in Harrogate, and to Londesborough in East Yorkshire to see what remains of the historic landscape designed by both the 1st and 3rd Lords Burlington with architect Robert Hooke and gardener Thomas Knowlton respectively. A study day was well attended at Burnby Hall Gardens, focusing on the Backhouse rock garden and its recent restoration. We visited the newly opened Thirsk Hall Sculpture Gardens, twenty acres of lawns, herbaceous borders, and a walled garden where contemporary sculptures are displayed. The Summer Party was held in the Edwardian gardens of Sion Hill Hall, beautifully restored by Michael Mallaby. Our member Moira Fulton introduced members to Newburgh Priory with a talk about its history at North Yorkshire County Record Office, where historic estate plans had been displayed for us, before a visit to the Priory. Our visit on a damp July day to the garden at Bowcliffe Hall was led by David Petherbridge, the new Head Gardener, who showed us the changes he was already making to the garden designed by Alastair Baldwin in 2008. Two weeks later the weather was perfect for our Summer Picnic, held this year in another 'modern' garden at Jervaulx Hall. A visit to Brodsworth Hall and Gardens run by English Heritage began with an introductory talk by Dr Michael Klemperer, Senior Gardens Advisor North/Midlands for English Heritage, which gave insights into managing the gardens for EH. Afterwards Daniel Hale, Head Gardener, led a guided tour of the gardens including its magnificent Victorian bedding borders and the evergreen topiary of over a thousand trees. Our final visit was to Ledston Hall, recently restored by the Wheler Foundation. Jane Furse gave an introductory talk about the history of the house and its owners, before Jane and Val Hepworth led members on a tour of the gardens and pleasure grounds, elements of which were designed in 1716 by Charles Bridgeman.

In the winter months we continued our partnership with the Gardens Trust, putting on Zoom talks. The first was given by Dr Camilla Allen and entitled 'Women of the Welfare Landscape: Uncovering women's contribution to the post 2<sup>nd</sup> World War landscape architecture in Britain'. Five further talks were for the Unforgettable Gardens series; Dr Patrick Eyres presented 'Naumachia to Naval Warfare', Sharon Sutton 'Historic Parks of the future - Cannon Hall', Jemima Hubberstey 'Exceeding fine Country, an 18thC tour of Yorkshire,' Trevor Nicholson talked about The Gardens at Harewood House and Gillian Parker's talk was called 'George Dillistone and the other Goddards'.

In the autumn, we were invited to meet Nick Smith who organises the Harrogate Flower Shows for the North of England Horticultural Society. As a result, he helped us to create a stand at the 2023 Autumn Flower Show held at Newby Hall, a new and different venture for YGT. He also organised a display on the West Lawn, the outline of a map of Yorkshire with symbols representing six sites where YGT has been involved, and created 'lectern stands' for information boards about the Trust. Members volunteered to decorate the stand, staff it for three days and interact with visitors to the Show. We did not recruit many new members on the day, but we were able to talk to the visitors and enlighten them about the Gardens Trusts and more specifically, the Yorkshire Gardens Trust.

Our Events committee meetings this year have been held on Zoom rather than in person, which has meant they are accessible to our committee members from all corners of Yorkshire without impacting our carbon footprint. To ensure that YGT remains active across a wide range of activities we welcome new volunteers to join committees and to bring fresh ideas to help with our role in conservation, research and organising events.



## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2023**

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#### **Finance: Madalyn Hughes**

YGT recorded a deficit for the year of £4,402 (2022: deficit £2,582). This movement in funds is attributable to requests for grants, Schools and Bursary exceeding income during the year. YGT's finances are in good shape, due to the continued support of our membership and due to the legacy of one of our founders, Phillipa Rakusen. Annual budgets are in place, agreed by the Trustees, to ensure the longevity of the Trust, (see also Financial Reserves Policy below). YGT's assets are held in cash or short-term deposit. Insurance, including professional indemnity and public liability insurance, is in place through the Gardens Trust.

#### **Financial Reserves Policy**

YGT aims to retain enough reserves to further the aims of the Trust and secure our future. YGT 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;
- 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 deposited its 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>.

## **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 four times in the year. 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. Each 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.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2023**

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

The Trustees are grateful for the support and guidance provided by YGT's three vice-presidents, Peter Goodchild, Caroline Legard, and Nick Lane Fox.

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 employs one part-time member of staff, to help with the organisation and recording of meetings, membership and other administrative matters. The work is unevenly spread over the year, averaging 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 26th AGM was held on Saturday 25 March 2023 at Sledmere House. The 27th AGM is to be held on Saturday 6 April 2024 at Askham Bryan College.

#### **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 2023 AGM Val Hepworth, Victoria Price and Chris Webb retired by rotation and were re-elected. Gail Falkingham resigned as a Trustee in July 2023. At the 2024 AGM Penelope Dawson Brown, Madalyn Hughes and Roger Lambert retire by rotation and are eligible for re-election, while Christine Beevers stepped down from being a Trustee at the end of January 2024.

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. Trustees also provide mentoring.

## YORKSHIRE GARDENS TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2023

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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:-

Christine Beevers	Bursary
Penelope Dawson Brown	Schools and Education
Gail Falkingham	Conservation and Planning, Membership and Events (Resigned 8 July 2023)
Val Hepworth	Conservation and Planning
Madalyn Joy Hughes	Treasurer, Membership and Engagement
Roger Charles Lambert	Conservation and Planning
Michael Brendan Mowforth	Small Grants
Gillian Parker	Secretary, Research and Recording
Vicky Price	Membership and Events
Christopher Charles Webb	Chairman, Conservation and Planning

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. Lucy Bennett undertook a remunerated role as Administrator for Events bookings, Membership Secretary and assisting the Council until Summer 2023, after which this role was undertaken by Lynn Watkinson.

**Independent examiner**

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

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**Bankers**

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Aldermore Bank  
1st Floor, Block B  
Western House  
Lynch Wood  
Peterborough PE2 6FZ



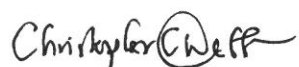
**YORKSHIRE GARDENS TRUST**

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FOR THE YEAR ENDED 30 SEPTEMBER 2023**

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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 January 2024 and signed on its behalf by:

A handwritten signature in black ink, appearing to read 'Christopher C Webb', written in a cursive style.

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 2023 set out on pages fifteen to twenty-six.

### **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

28 February 2024.

**YORKSHIRE GARDENS TRUST**

**STATEMENT OF FINANCIAL ACTIVITIES  
(INCORPORATING AN INCOME AND EXPENDITURE ACCOUNT)  
FOR THE YEAR ENDED 30 SEPTEMBER 2023**

		<b>Unrestricted Funds</b>	<b>Restricted Funds</b>	<b>2023 Total funds</b>	<b>2022 Total funds</b>
	<b>Notes</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>INCOME FROM</b>					
Donations and legacies	3	5,091	183	5,274	5,842
<b>Charitable activities</b>					
Functions, events	4	7,378	705	8,083	12,960
Investment income	5	1,572	-	1,572	1,064
<b>Total</b>		<b>14,041</b>	<b>888</b>	<b>14,929</b>	<b>19,866</b>
<b>EXPENDITURE ON</b>					
<b>Charitable activities</b>					
Functions, events	4	(5,094)	(280)	(5,374)	(8,022)
Grants, donations	6	(4,083)	(1,973)	(6,056)	(7,160)
Support costs	7	(7,901)	-	(7,901)	(7,266)
<b>Total</b>		<b>(17,078)</b>	<b>(2,253)</b>	<b>(19,331)</b>	<b>(22,448)</b>
<b>NET INCOME/ (EXPENDITURE)</b>		<b>(3,037)</b>	<b>(1,365)</b>	<b>(4,402)</b>	<b>(2,582)</b>
<b>RECONCILIATION OF FUNDS</b>					
<b>Total funds brought forward</b>		<b>71,038</b>	<b>1,898</b>	<b>72,936</b>	<b>75,518</b>
<b>TOTAL FUNDS CARRIED FORWARD</b>		<b>68,001</b>	<b>533</b>	<b>68,534</b>	<b>72,936</b>



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

**BALANCE SHEET  
AT 30 SEPTEMBER 2023**

	Notes	Unrestricted Funds £	Restricted Funds £	2023 Total funds £	2022 Total funds £
<b>CURRENT ASSETS</b>					
Debtors	12	606	-	606	719
Cash at bank		69,055	533	69,588	73,917
<b>Total</b>		<b>69,661</b>	<b>533</b>	<b>70,194</b>	<b>74,636</b>
<b>CREDITORS</b>					
Amounts falling due within one year	13	(1,660)	-	(1,660)	(1,700)
<b>NET CURRENT ASSETS</b>		<b>68,001</b>	<b>533</b>	<b>68,534</b>	<b>72,936</b>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		<b>68,001</b>	<b>533</b>	<b>68,534</b>	<b>72,936</b>
<b>NET ASSETS</b>		<b>68,001</b>	<b>533</b>	<b>68,534</b>	<b>72,936</b>
<b>FUNDS</b>					
Unrestricted funds	15			68,001	71,038
Restricted funds				533	1,898
<b>TOTAL FUNDS</b>				<b>68,534</b>	<b>72,936</b>

**BALANCE SHEET – CONTINUED**  
**AT 30 SEPTEMBER 2023**

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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 2023.

The members have not required the charitable company to obtain an audit of its financial statements for the year ended 30 September 2023 in accordance with Section 476 of the Companies Act 2006.

The trustees acknowledge their responsibilities for

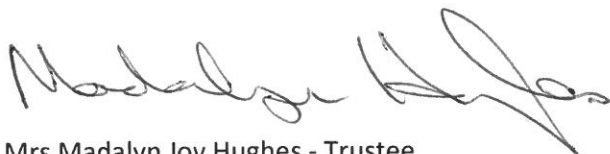
- (a) ensuring that the charitable company keeps accounting records that comply with Sections 386 and 387 of the Companies Act 2006 and
- (b) preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its 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 January 2024 and were signed on its behalf by:



Mr Christopher Charles Webb - Trustee



Mrs Madalyn Joy Hughes - Trustee

NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 30 SEPTEMBER 2023

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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.



## YORKSHIRE GARDENS TRUST

### NOTES TO THE FINANCIAL STATEMENTS - CONTINUED FOR THE YEAR ENDED 30 SEPTEMBER 2023

#### 2. ACCOUNTING POLICIES - continued

##### 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.

#### 3. DONATIONS AND LEGACIES

	2023	2022
	£	£
Members subscriptions	4,232	4,189
Gift Aid	606	719
Donations	436	934
	<u>5,274</u>	<u>5,842</u>

#### 4. INCOME FROM CHARITABLE ACTIVITIES

	2023	2022
	£	£
Functions, events income	8,083	12,960
Functions, events costs	(5,374)	(8,022)
Functions, events surplus	<u>2,709</u>	<u>4,938</u>

#### 5. INVESTMENT INCOME

	2023	2022
	£	£
Deposit account interest	<u>1,572</u>	<u>1,064</u>

# YORKSHIRE GARDENS TRUST

## NOTES TO THE FINANCIAL STATEMENTS - CONTINUED FOR THE YEAR ENDED 30 SEPTEMBER 2023

### 6. GRANTS PAYABLE

	2023	2022
	£	£
Grants, donations	<u>6,056</u>	<u>7,160</u>

The total of grants paid during the year was:

	2023	2022
	£	£
Schools Project	4,083	4,610
Bursary – RHS Level 2 course	973	-
Friends of Boston Park	-	600
Bursary re research – James Russell	-	950
Bursary – demonstration garden RHS Tatton	1,000	1,000
	<u>6,056</u>	<u>7,160</u>

There were no grant offers made in addition to the grants paid during the year (2022: £nil), which will become due when specific conditions are met by the beneficiaries.

	2023	2022
	£	£
Grants paid to institutions	4,083	5,210
Grants paid to individuals	1,973	1,950
	<u>6,056</u>	<u>7,160</u>

### 7. SUPPORT COSTS

	2023	2022
	£	£
Secretary costs	2,068	624
Accountancy	810	736
Printing, postage and stationery	3,170	2,908
Research	475	238
Affiliations	688	668
Insurance	278	278
Computer costs and licences	100	244
Room hire	312	70
Website development costs	-	1,500
	<u>7,901</u>	<u>7,266</u>

**NOTES TO THE FINANCIAL STATEMENTS - CONTINUED**  
**FOR THE YEAR ENDED 30 SEPTEMBER 2023**

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

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

	<b>2023</b>	2022
	<b>£</b>	£
Accountancy and Independent Examination	<b>810</b>	736

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

There were no trustees' remuneration, benefits or expenses for the year ended 30 September 2023 or for the year ended 30 September 2022.

**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	5,560	282	5,842
<b>Charitable activities</b>			
Functions, events	12,960	-	12,960
Investment income	1,064	-	1,064
<b>Total</b>	19,584	282	19,866
<b>EXPENDITURE ON</b>			
<b>Charitable activities</b>			
Functions, events	(8,022)	-	(1,673)
Grants, donations	(5,210)	(1,950)	(7,160)
Support costs	(7,213)	(53)	(7,266)
<b>Total</b>	(20,445)	(2,003)	(22,448)
<b>NET INCOME/ (EXPENDITURE)</b>	(861)	(1,721)	(2,582)

NOTES TO THE FINANCIAL STATEMENTS - CONTINUED  
FOR THE YEAR ENDED 30 SEPTEMBER 2023

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

## RECONCILIATION OF FUNDS

Total funds brought forward	71,899	3,619	75,518
<b>TOTAL FUNDS CARRIED FORWARD</b>	<u>71,038</u>	<u>1,898</u>	<u>72,936</u>

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

	<b>2023</b>	2022
	£	£
Other debtors	<u>606</u>	<u>719</u>

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

	<b>2023</b>	2022
	£	£
Other creditors and deferred income	<u>1,660</u>	<u>1,700</u>



**NOTES TO THE FINANCIAL STATEMENTS - CONTINUED**  
**FOR THE YEAR ENDED 30 SEPTEMBER 2023**

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**14. DEFERRED INCOME**

Included within creditors falling due within one year is a total of £850 (2022: £963) in relation to deferred income.

£423 (2022: £556) of this amount relates to income from events that were required to be cancelled, as a result of COVID-19 pandemic restrictions. A refund has been offered to the customers concerned. Some individuals offered that the charity retain the relevant amounts as donations to unrestricted funds, such amounts have been recognised as income.

The remaining £427 (2022: £407) relates to funds received from individuals who paid for attendance at an event, but subsequently cancelled their attendance or from members who have paid in advance. The funds have been retained by the Charity for use by the relevant individuals at future events in 2024.

There are no amounts held that relate specifically to events that either occurred or are scheduled to occur within one year of the year-end date (2022: £nil).

YORKSHIRE GARDENS TRUST

NOTES TO THE FINANCIAL STATEMENTS - CONTINUED  
FOR THE YEAR ENDED 30 SEPTEMBER 2023

15. MOVEMENT IN FUNDS

	At 30/9/22 £	Net movement in funds £	Transfers between funds £	At 30/9/23 £
<b>Unrestricted funds</b>				
General fund	69,988	(3,037)	-	66,951
Lotherton Hall Gardens fund	1,050	-	-	1,050
	<u>71,038</u>	<u>(3,037)</u>	<u>-</u>	<u>68,001</u>
<b>Restricted funds</b>				
North Yorkshire County Council	118	-	-	118
Horticultural Student Bursary	1,780	(1,365)	-	415
	<u>1,898</u>	<u>(1,365)</u>	<u>-</u>	<u>533</u>
<b>TOTAL FUNDS</b>	<u>72,936</u>	<u>(4,402)</u>	<u>-</u>	<u>68,534</u>

Net movement in funds, included in the above are  
as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	14,041	(17,078)	(3,037)
	<u>14,041</u>	<u>(17,078)</u>	<u>3,037</u>
<b>Restricted funds</b>			
North Yorkshire County Council	-	-	-
Horticultural Student Bursary	888	(2,253)	(1,365)
	<u>888</u>	<u>(2,253)</u>	<u>(1,365)</u>
<b>TOTAL FUNDS</b>	<u>14,929</u>	<u>(19,331)</u>	<u>(4,402)</u>

# YORKSHIRE GARDENS TRUST

## NOTES TO THE FINANCIAL STATEMENTS - CONTINUED FOR THE YEAR ENDED 30 SEPTEMBER 2023

### 15. MOVEMENT IN FUNDS

	At 30/9/21 £	Net movement in funds £	Transfers between funds £	At 30/9/22 £
<b>Unrestricted funds</b>				
General fund	71,899	(861)	(1,050)	69,988
Lotherton Hall Gardens fund	-	-	1,050	1,050
	<u>71,899</u>	<u>(861)</u>	<u>-</u>	<u>71,038</u>
<b>Restricted funds</b>				
North Yorkshire County Council	171	(53)	-	118
Horticultural Student Bursary	3,448	(1,668)	-	1,780
	<u>3,619</u>	<u>(1,721)</u>	<u>-</u>	<u>1,898</u>
<b>TOTAL FUNDS</b>	<u>75,518</u>	<u>(2,582)</u>	<u>-</u>	<u>72,936</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	19,584	(20,445)	(861)
	<u>19,584</u>	<u>(20,445)</u>	<u>(861)</u>
<b>Restricted funds</b>			
North Yorkshire County Council	-	(53)	(53)
Horticultural Student Bursary	282	(1,950)	(1,668)
	<u>282</u>	<u>(2,003)</u>	<u>(1,721)</u>
<b>TOTAL FUNDS</b>	<u>19,866</u>	<u>(22,448)</u>	<u>(2,582)</u>

## **YORKSHIRE GARDENS TRUST**

### **NOTES TO THE FINANCIAL STATEMENTS - CONTINUED FOR THE YEAR ENDED 30 SEPTEMBER 2023**

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#### **15. MOVEMENT IN FUNDS – continued**

##### **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.

##### **Designated funds**

Net proceeds of £1,050 received from an Edwardian gardens continuing professional development day held by the Charity's conservation sub-committee at Lotherton Hall in June 2022, have been designated for future expenditure on specific projects in the gardens at Lotherton Hall. Such projects should result from Leeds County Council developing a 'Vision and Action Plan' for the gardens.

#### **16. RELATED PARTY DISCLOSURES**

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