

**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 2022  
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 2022**

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## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2022**

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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 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	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**

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#### **ACHIEVEMENTS AND PERFORMANCE**

##### **HIGHLIGHTS OF THE YEAR: Chris Webb**

This year marked 25 years since we were founded, a period of considerable achievement as the articles in our Newsletters showed. We lost some people on the way, inevitably, and we remembered them in our articles. But it was principally a year of celebration, which we marked at Rudding Park and at Harewood.

To start our foundation anniversary, we met at Rudding Park in October, hosted by Simon and Judi Mackaness. Rudding provided us with a splendid and convivial lunch, followed by an entertaining and informative address from Stephen Anderton, who had given our inaugural talk 25 years previously at Askham Bryan College. Stephen continued his thought-provoking theme from 25 years previously: 'Managing historic parks and gardens and the problems which need to be addressed'.

Towards the end of our foundation year, we met at Harewood in July on a classic summer evening, and where we had held our launch meeting 25 years ago.

As well as Harewood's head gardener, our president and her husband, we were a group of old and new YGT members. Some of us had attended the meeting here to launch YGT in 1997; others were newer on the scene, taking advantage of the groundwork of our predecessors. We started on the terrace (differently planted and tended than it was 25 years ago) with a glass of prosecco, lots of mingling and chat, old and new friends eager to hear Trevor Nicholson and our president before an exclusive guided tour of the immediate grounds.

Lady Harewood opened proceedings in the Terrace Gallery, recalling the occasion for our evening and our long and mutually supportive relationship with Harewood. Then Trevor, who gripped us, talking *ex tempore*, weaving his own journey as a gardener into the evolution of Harewood's estate and the imperative to respond to climate change. He started, more or less, with his practical instruction in digging as an apprentice gardener and ended with the theory and practice of no dig gardens, of treating and nurturing the soil, of sustainable cultivation, of minimising transport, and of using the large walled garden as it was intended, as an integral part of the life of the estate.

Then, on to the garden itself, starting on the terrace, down through the woodland to the head of the lake where we paused to consider the Himalayan garden and the stupa (whose story is told in David Lascelles' recent book *A Hare-Marked Moon: From Bhutan to Yorkshire: The Story of an English Stupa*, published in 2021). Then along the lakeside path, passing the tree planted by her grandchildren 'in memory of Grandma Patricia', and the bothy at the door to the walled garden. All the while Trevor and his colleagues talked, explained, described, answered questions, and debated as the changing groups of YGT members flowed and coalesced, paused and pondered as Trevor's and his colleagues' insights and perspectives caused us to stop and rethink our own ideas on the importance and nature of gardens and gardening past, present and future.

This memorable celebration instilled admiration, respect and delight at the time, and continues to demand and command serious reflection in the months since. It acts as a paradigm for the year and the years to come: the need and the skill to maintain the value of the landscapes we inherit, but at the same time to recognise which changes are most likely to aid in their preservation.

## **YORKSHIRE GARDENS TRUST**

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Our long-planned Edwardian Gardens study day at Lotherton, much delayed by the pandemic, took place in June. This was a significant event, drawing not just our members, but significantly, estate gardeners and managers from a wide area. Val Hepworth provides more detail in her Conservation report. Here it's important to note the long-term importance of the day, which was rich in potential for new networks and collaborations as well as delivering much-needed knowledge and information.

In a further look back to planned events disrupted by the pandemic, in September we finally welcomed members of the Gardens Trust to a weekend of visiting and celebrating the gardens of Richmondshire. Originally timed to coincide with its AGM, members of GT and YGT gathered at Scotch Corner as a base for two days of visits, ably organised and hosted by YGT.

One serious change we made in the year, which provides us with a key foundation for our work as Trevor's no-dig regime does for his garden, was the complete reimagining and rebuilding of our website. We wrote about this in our last annual report: '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'. Louise and her subcommittee rolled out our new website on time, and it does indeed do what we hoped last year, in providing 'a new look' and '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'. We now have one of the most effective websites in the county gardens trusts family.

As reported last year we had completed our previous development plan, and, responding to that fact and the contents of that plan, Council of Management and our Committees have spent some of this year thinking about our next five years. We have gone through some dark and difficult times, and the outlook is at best, not easy. Our new plan attempts to address the present high level of uncertainty about the future by being flexible enough to allow us to respond to changes as they happen, while being clear about our direction of travel. As ever, only time will know whether this approach is effective.

It is probably no surprise that we continued to meet and to hold events using Zoom, while taking advantage of our greater freedom to meet in person. Zoom and similar technologies have been one of the discoveries of the pandemic. We have all got better at it and became more comfortable with it as a part of our life. Our carbon footprint is lower than it was, and more people find it easier to engage with YGT as a result. More people, from a much wider geographical area can (and do) attend our online talks than is practical for a garden visit. There is no doubt that this hybrid way of working and meeting is here to stay.

It would be remiss of us not to record the retirement of Louise Amende, who stepped down in the summer after more than a decade as the central contact and administrator for YGT. Her kind and welcoming approach, her efficiency, skill, inventiveness, knowledge and counsel across the whole spectrum of the Trust's work will be missed. Louise has taken up a new role in a Church of England parish, where our loss is very much their gain. We recruited Louise's successor towards the end of August, and Lucy Bennett will already be known to most of us from her membership communications and her profile that was published in the first Newsletter of 2023.

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.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2022**

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#### ***Our challenges***

Some of the challenges we wrote about last year are still with us, as they are long term. One of our most serious problems remains the need to recruit new people to assist in YGT's work. Our Committees continue to 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. Looking outside YGT, it's hard to see climate change as anything other than the most pressing challenge this generation of gardeners and garden owners must address. More temporally confined in time, but with potential for significant impact over the long term, the Levelling Up and Regeneration Bill, the Retained EU Law (Revocation and Reform) Bill, the impact of inflation on gardens and garden visitors alike will all take our attention in the coming year.

#### **OUR PRINCIPAL ACTIVITIES**

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

We currently have 15 volunteers working on 14 sites ranging across the historic county of Yorkshire from Gisborough Hall/Priory in Redcar and Cleveland to the north to Graves Park (Norton Hall) in the south on the border with Derbyshire and from Kilnwick in East Yorkshire to Clifton Castle on the eastern edge of the Yorkshire Dales National Park. Progress has been slow for some, as the after effects of the various lockdowns lingered with restricted hours at archives and site visits were also difficult to arrange. However, our dedicated team have soldiered on and worked with the resources that were available to them.

The new website with its dedicated database of historic parks and gardens provides a useful resource both for our volunteers and for the Conservation and Planning group. There are over 200 entries on the database, of which 65 have detailed reports (almost all being for sites not on Historic England's Register of Parks and Gardens of special historic interest). A new feature on the website is the blog where short articles based on the team's research are published. These are then promoted on the YGT's Instagram page, in the hope that it encourages more volunteers to come forward.

Since early 2020, it has been difficult to undertake training as face-to-face meetings were limited. It was encouraging therefore to have our first training day in over two years in June at Brodsworth Hall in South Yorkshire, which eight of our volunteers attended. The themes of the day were exploring boundaries of historic parks and gardens and looking at non-visible historic layers. Michael Klemperer, head of gardens in the north for English Heritage, first gave us an overview of the history and extent of the Brodsworth estate and then together with the head gardener, Daniel Hale, we toured the site noting the unseen layers. Daniel and Michael also gave us an insight into managing an historic designed landscape that we found really interesting and relevant for when we help our Conservation colleagues with planning applications.

**REPORT OF THE TRUSTEES  
FOR THE YEAR ENDED 30 SEPTEMBER 2022**

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**Conservation and planning: Val Hepworth**

The Edwardian Gardens Conference at Lotherton Hall with Leeds City Council on 22<sup>nd</sup> June 2022 was our long-awaited special conservation event this year. This should have taken place in 2020 but instead ended up being cancelled twice due to the pandemic. Malcolm Barnett, Jane Furse and Val Hepworth worked closely with officers of Leeds CC particularly Adam Toole (Curator, now at Temple Newsam) and Maria Akers (Senior Estates Manager, Lotherton and Temple Newsam). The lectures from Mette Eggan, Jane Furse, Dr John Grimshaw and Chris Flynn worked beautifully together giving a good range of information and a look to the future. The afternoon group visit to the gardens was also valuable with much debate and advice. This event was specifically tailored as Continuing Professional Development for those working in or associated with historic gardens and was fully subscribed including staff from Leeds Parks and Countryside. We also gave free places and free YGT membership until March 2024 for 10 students. The brief - 'Vision, Strategy and Workplan for Lotherton Hall Estate formal gardens' - highlighted at the event, has resulted in consultants drawing up a scheme for the gardens.

Our Conservation and Planning sub-committee meetings took place in October, January, May and July; three on Zoom as a precautionary measure and with one face-to-face. At full-strength we have ten 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 can call on several YGT members who are not on the sub-committee but have particular knowledge and are always willing to help.

Val Hepworth retired as Chairman of the Conservation and Planning sub-committee at the March 2022 AGM after many years at the helm, but as a YGT trustee she continues writing the responses to both planning and Forestry Commission consultations with help from the team. A new chairman has not been appointed but Chris Webb chairs the meetings and Geoff Hughes assists with the agenda and minutes.

As a statutory consultee the Gardens Trust sends the Trust weekly 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 and often here we can call on the research knowledge of YGT's Research and Recording group. We work on planning matters with the Conservation Officers at the Gardens Trust, notify Historic England of all responses and where appropriate, work closely with officers of Historic England, particularly landscape architect Chris Mayes and historic environment specialist, Dr Margaret Nieke of Natural England.

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 continues unabated. We are consulted by the Forestry Commission re felling/thinning licences for Registered Historic Parks and Gardens in Yorkshire and now seem to be on the radar of the Woodland Trust and the Regional Community Forest projects who are consulting us regarding proposed tree planting. This is quite a load for a voluntary organisation. We have responded to about 120 planning applications, including fairly frequently being reconsulted for advice on amendments. We have had some 16 woodland and Forestry Commission consultations including for Nun Appleton, Newburgh Estate, Houghton Hall, Middleton Lodge Hornby, Thwaite Hall and major ones for Harewood as part of the estate's parkland restoration proposals. These can be very time-consuming, but it is rewarding when we get appreciative feedback from Woodland Officers. We hope that our detailed responses aid their understanding of historic designed landscapes and influences how the landscapes can be managed in the future.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2022**

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Roger Lambert and Win Derbyshire have begun analysing planning outcomes and our planning responses can be seen online on the relevant planning authority's website. This year the upgraded YGT website has new Conservation pages and Geoff Hughes has been working on those including uploading all our planning responses.

Our planning and conservation work also includes site visits with developers and conservation officers where the proposals are complex such as at High Melton Hall, near Doncaster and Thwaite Hall at Cottingham.

Applications that are significant for their impact on a site or for the complexity of the response included developments at:

Bretton Hall; Pine Lodge at Wentworth Castle; Allerton Park; Thwaite Hall; High Melton Hall; Wentworth Woodhouse.

#### **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.

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

In 2022 YGT received six expressions of interest in applying for the Student Bursary.

Three were from students studying landscape design and architecture. Three were from students seeking support for horticultural training. Of the six enquiries three translated into full applications.

Two applicants were successful (the third application was withdrawn since due to alternative funding being found); Emma Hill and Camellia Hayes were awarded funding to complete their Masters degrees. Research themes were varied. One focused on the plantsman and designer James Russell and his gardens and influence in Yorkshire. The other related to a garden design project and its relevance to social issues such as mental health for a Masters in Landscape Architecture).

A total of £1,949.61 has been awarded to the Bursary recipients who completed their projects in 2022. Funding was used for travel, accommodation, research and recording equipment, and the purchase of plants.

The range of expressions of interest/applications has been invaluable in refining the criteria which form the basis of the Bursary Scheme.

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2022**

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

The delegation of Bursary applications to a subgroup of three trustees has worked well, effectively using each Trustee's skills and expertise. This has created a quicker response time to applications as well as the opportunity to suggest specific information for individuals to include in their application.

The re-imbursement process has also gone smoothly, thanks to the Treasurer's quick and efficient approach which was much appreciated by the recipients.

#### ***Monitoring, feedback and evaluation***

Both students were visited in the course of their projects which provided a real insight into project content, research processes, the use of funding and an indication of initial outcomes. End of project feedback interviews also took place. Emma and Camellia appreciated the support received from the YGT Student Bursary Scheme. Not only did it enable them to achieve their individual successes, but it also has provided a significant steppingstone for their future career development.

2022's Bursary Scheme activity and outcomes were encouraging and provided important pointers for its continuing development.

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

Through the Schools sub-committee, the Trust supports, advises and channels funds to our 54 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.

During 2021/22 financial year we:

- Made gifts of sunflower seeds to all schools: £325.99
- Offered the book 'Gardening for Kids' by Dawn Issac to all schools; 25 schools took the offer up: £431.03
- Awarded four Grounds Development Awards: £1200
- Awarded financial support towards a Wacks Wicked Plants workshop held in the successful school: £300
- Offered apple trees to all schools; 11 schools took up the offer: £440
- Gave 8 sets of 12 Gorilla Trugs (tubs): £689.44
- Gave 11 sets of 5 children's tools: £962.83
- Gave a welcome gift of tools to one school: £20.33
- Gave all schools Blue Lupin seeds: £243

#### **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 2022

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

Category of membership	Number of memberships 2021-22	Number of memberships 2020-21	Increase/decrease
Life	25	25	0
Annual double	70	69	+1
Annual single	118	119	-1
Association	2	2	0
Corporate	1	1	0
Student	6	6	0
School	54	52	+2
Honorary life	1	1	0
Honorary annual single*	31	21	+10
Honorary annual double*	14	14	0
Total memberships	322	310	+12

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

Members and we hope 'would be' members now have several ways of engaging with the Trust, both active and passive. Two hard copies of the newsletter are published every year and sent to all members, and in this period the three e-bulletins, which Christine Miskin, the newsletter editor, produced were as packed full of information as the hard copy newsletters with reports of visits, articles and information about the work of the Trust. The new website has been designed to make it easy for both members and browsers to navigate and find information about all the Trust's activities. An awareness that it would be easy to be left behind with social media, for those members (and others) who are interested there is a Twitter account and a new Instagram account @yorkshiregardenstrust.

For those who wish to engage actively our 'Events' calendar for the year included two special events to celebrate the 25 years since the Trust was founded. Guests were welcomed to a luncheon held at Ridding Park in October and hosted by Simon and Judi Mackaness, where Stephen Anderton who had given the inaugural talk 25 years previously at Askham Bryan College, continued his thought-provoking theme from 25 years previously with the after-luncheon talk 'Managing historic parks and gardens and the problems which need to be addressed'. In July, Harewood House was the setting for an evening party where the guests were addressed by our president Diane Countess of Harewood, and the Head Gardener Trevor Nicholson who commented on how gardening had changed in 25 years and has had to become more sustainable before he took the guests on a tour of the gardens.

## YORKSHIRE GARDENS TRUST

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Fortunately, with the new year and a sense that the worst of the covid pandemic was over, a full events programme was resumed. Our AGM, which had had to be postponed twice due to the Covid pandemic, was held at Bramham Park, by kind permission of Nick Lane Fox our Vice President. The talk 'The Great Formal Layouts of Gardens and Parks 1610- 1740' was given by David Jacques before a walk through the Bramham landscape after lunch. Other events this year included a snowdrop visit to Wentworth Woodhouse, a visit to Boynton, near Bridlington, Goddards, the former gardens of Noel Goddard Terry, of the famous chocolate-making company in York and the Roman site at Aldborough. We also visited Thwaite Botanic Garden and Bishop Burton College walled garden, the once private gardens of the Sitwell family at Renishaw Hall, the £3.8 million restoration at Cannon Hall and Waterton Park, the home of the world's first wildlife sanctuary, near Wakefield. The summer picnic was held in the delightful garden of Clemens and Johanna Heinrichs at Lastingham on the North York Moors. Our last visit of the year was to Gillingwood Hall where an afternoon was spent exploring and interpreting the landscape with Northumbria Gardens Trust. We were able to re-start our biennial joint lectures with the Yorkshire Philosophical Society with a talk given by Louise Wickham, based on the newly published book she has written with Deborah Turnbull, *Thomas White (c. 1736-1811): Redesigning the Northern British Landscape*.

One bonus of the Covid pandemic was finding how easy it was to mount talks on Zoom to engage with members, especially during the cold winter months. We have continued our partnership with the Gardens Trust and their series 'Unforgettable Gardens' with five talks. Given by Christopher Ridgway about Castle Howard, Tom Stuart Smith – Three Yorkshire Gardens, Martin Roberts on 'Old Durham Gardens' and Some of Mr Aislabie's Other Places: Kirby Fleetham and Hackfall, given by Gail Falkingham and Mark Newman. In early September there was another collaboration with the Gardens Trust who held a Richmondshire weekend, for which Val Hepworth was one of the main organisers. This was a chance for Yorkshire Gardens Trust members to meet people from other Gardens Trusts, who were exploring the wealth of garden treasures in Yorkshire with visits to Bolton Castle, Bolton Hall, Aske, Constable Burton, Millgate House and Temple Grounds.

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 the Trust 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.

#### Finance

The Trust recorded a deficit for the year of £2,582 (2021 surplus £2,161). This movement in funds is largely attributable to requests for grants, notably Schools, Small Grants and Bursary exceeding income during the year. The finances of the Trust are in good shape, due to the continued support of our membership and, 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.

In June 2022 the Conservation sub-committee held an Edwardian Gardens CPD (Continuing Professional Development) day at Lotherton Hall in association with Leeds City Council which resulted in net income of £1,050. These funds have been transferred to a Designated fund to be used for specific projects in the gardens at Lotherton Hall that should result from Leeds City Council developing a 'Vision and Action Plan' for the gardens.

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

## **YORKSHIRE GARDENS TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 30 SEPTEMBER 2022**

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#### **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
- 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 4 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, 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.

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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, 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 25<sup>th</sup> AGM was held on Saturday 26 March at Bramham Park. The 26<sup>th</sup> AGM is to be held on Saturday 25<sup>th</sup> March at Sledmere House.

#### **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 2022 AGM Pat Gore resigned, while Val Hepworth and Gail Falkingham retired by rotation and were re-elected. We were delighted to welcome Brendan Mowforth and Gillian Parker as Trustees in 2022.

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 2022**

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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
Patricia Gore	Events, Bursary Scheme Oversight (resigned 26/03/2022)
Christopher Charles Webb	Chairman
Roger Charles Lambert	Conservation
Christine Beevers	Student Bursary, Events, Research and Recording
Gillian Parker	Secretary (appointed 26/03/2022)
Michael Brendan Mowforth	Small Grants (appointed 26/03/2022)

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 undertook a remunerated role as Administrator for Events bookings, Membership Secretary and assisting the Council until July 2022, after which this role was undertaken by Lucy Bennett.

**Independent examiner**

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

**Solicitors**

Wrigleys  
19 Cookridge Street  
Leeds LS2 3AG

**Bankers**

Virgin Money  
46 Coney Street  
York YO1 1NQ  
  
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 2022**

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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 24 January 2023 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 2022 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

10 February 2023

**YORKSHIRE GARDENS TRUST**

**STATEMENT OF FINANCIAL ACTIVITIES  
(INCORPORATING AN INCOME AND EXPENDITURE ACCOUNT)  
FOR THE YEAR ENDED 30 SEPTEMBER 2022**

	Notes	Unrestricted Funds £	Restricted Funds £	2022 Total funds £	2021 Total funds £
<b>INCOME FROM</b>					
Donations and legacies	3	5,560	282	5,842	7,820
<b>Charitable activities</b>					
Functions, events	4	12,960	-	12,960	5,157
Investment income	5	1,064	-	1,064	1,103
<b>Total</b>		<b>19,584</b>	<b>282</b>	<b>19,866</b>	<b>14,080</b>
<b>EXPENDITURE ON</b>					
<b>Charitable activities</b>					
Functions, events	4	(8,022)	-	(8,022)	(1,673)
Grants, donations	6	(5,210)	(1,950)	(7,160)	(4,459)
Support costs	7	(7,213)	(53)	(7,266)	(5,787)
<b>Total</b>		<b>(20,445)</b>	<b>(2,003)</b>	<b>(22,448)</b>	<b>(11,919)</b>
<b>NET INCOME/ (EXPENDITURE)</b>		<b>(861)</b>	<b>(1,721)</b>	<b>(2,582)</b>	<b>2,161</b>
<b>RECONCILIATION OF FUNDS</b>					
<b>Total funds brought forward</b>		<b>71,899</b>	<b>3,619</b>	<b>75,518</b>	<b>73,357</b>
<b>TOTAL FUNDS CARRIED FORWARD</b>		<b>71,038</b>	<b>1,898</b>	<b>72,936</b>	<b>75,518</b>

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

**BALANCE SHEET  
AT 30 SEPTEMBER 2022**

	Notes	Unrestricted Funds £	Restricted Funds £	2022 Total funds £	2021 Total funds £
<b>CURRENT ASSETS</b>					
Debtors	12	719	-	719	2,517
Cash at bank		72,019	1,898	73,917	80,345
<b>Total</b>		<b>72,738</b>	<b>1,898</b>	<b>74,636</b>	82,862
<b>CREDITORS</b>					
Amounts falling due within one year	13	(1,700)	-	(1,700)	(7,344)
<b>NET CURRENT ASSETS</b>		<b>71,038</b>	<b>1,898</b>	<b>72,936</b>	75,518
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		<b>71,038</b>	<b>1,898</b>	<b>72,936</b>	75,518
<b>NET ASSETS</b>		<b>71,038</b>	<b>1,898</b>	<b>72,936</b>	75,518
<b>FUNDS</b>					
Unrestricted funds	15			71,038	71,899
Restricted funds				1,898	3,619
<b>TOTAL FUNDS</b>				<b>72,936</b>	75,518

**BALANCE SHEET – CONTINUED  
AT 30 SEPTEMBER 2022**

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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 2022.

The members have not required the charitable company to obtain an audit of its financial statements for the year ended 30 September 2022 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 24 January 2023 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 2022

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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.

**NOTES TO THE FINANCIAL STATEMENTS - CONTINUED**  
**FOR THE YEAR ENDED 30 SEPTEMBER 2022**

**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**

	<b>2022</b>	2021
	£	£
Members subscriptions	<b>4,189</b>	4,402
Legacies	-	2,000
Gift Aid	<b>719</b>	717
Donations	<b>934</b>	701
	<b><u>5,842</u></b>	<u>7,820</u>

**4. INCOME FROM CHARITABLE ACTIVITIES**

	<b>2022</b>	2021
	£	£
Functions, events income	<b>12,960</b>	5,157
Functions, events costs	<b>(8,022)</b>	(1,673)
Functions, events surplus	<b><u>4,938</u></b>	<u>3,484</u>

**5. INVESTMENT INCOME**

	<b>2022</b>	2021
	£	£
Deposit account interest	<b><u>1,064</u></b>	<u>1,103</u>

# YORKSHIRE GARDENS TRUST

## NOTES TO THE FINANCIAL STATEMENTS - CONTINUED FOR THE YEAR ENDED 30 SEPTEMBER 2022

### 6. GRANTS PAYABLE

	2022	2021
	£	£
Grants, donations	<b>7,160</b>	4,459

The total of grants paid during the year was:

	2022	2021
	£	£
Schools Project	<b>4,610</b>	2,484
Broomhill Community Trust, Sheffield – historic garden restoration	-	1,000
Digitisation of a model of a significant “Backhouse” rockery	-	350
To support research for a book about Thomas White	-	625
Friends of Boston Park	<b>600</b>	-
Bursary re research – James Russell	<b>950</b>	-
Bursary – demonstration garden RHS Tatton	<b>1,000</b>	-
	<b>7,160</b>	4,459

There were no grant offers made in addition to the grants paid during the year (2021: £600), which will become due when specific conditions are met by the beneficiaries.

	2022	2021
	£	£
Grants paid to institutions	<b>5,210</b>	3,484
Grants paid to individuals	<b>1,950</b>	975
	<b>7,160</b>	4,459

### 7. SUPPORT COSTS

	2022	2021
	£	£
Secretary costs	<b>624</b>	1,344
Accountancy	<b>736</b>	703
Printing, postage and stationery	<b>2,908</b>	2,182
Research	<b>238</b>	80
Affiliations	<b>668</b>	640
Insurance	<b>278</b>	260
Computer costs and licences	<b>244</b>	204
Advertising	-	215
Marketing for events	-	159
Room hire	<b>70</b>	-
Website development costs	<b>1,500</b>	-
	<b>7,266</b>	5,787

# YORKSHIRE GARDENS TRUST

## NOTES TO THE FINANCIAL STATEMENTS - CONTINUED FOR THE YEAR ENDED 30 SEPTEMBER 2022

### 8. NET INCOME/(EXPENDITURE)

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

	2022	2021
	£	£
Accountancy and Independent Examination	<u>736</u>	<u>703</u>

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

There were no trustees' remuneration, benefits or expenses for the year ended 30 September 2022 or for the year ended 30 September 2021.

### 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	7,720	100	7,820
<b>Charitable activities</b>			
Functions, events	5,157	-	5,157
Investment income	1,103	-	1,103
<b>Total</b>	<u>13,980</u>	<u>100</u>	<u>14,080</u>
<b>EXPENDITURE ON</b>			
<b>Charitable activities</b>			
Functions, events	(1,673)	-	(1,673)
Grants, donations	(4,459)	-	(4,459)
Support costs	(5,707)	(80)	(5,787)
<b>Total</b>	<u>(11,839)</u>	<u>(80)</u>	<u>(11,919)</u>
<b>NET INCOME/ (EXPENDITURE)</b>	<u>2,141</u>	<u>20</u>	<u>2,161</u>

**YORKSHIRE GARDENS TRUST**

**NOTES TO THE FINANCIAL STATEMENTS - CONTINUED  
FOR THE YEAR ENDED 30 SEPTEMBER 2022**

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

**RECONCILIATION OF FUNDS**

<b>Total funds brought forward</b>	69,758	3,599	73,357
<b>TOTAL FUNDS CARRIED FORWARD</b>	<u>71,899</u>	<u>3,619</u>	<u>75,518</u>

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

	<b>2022</b>	2021
	<b>£</b>	£
Other debtors	<u><b>719</b></u>	<u>2,517</u>

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

	<b>2022</b>	2021
	<b>£</b>	£
Other creditors and deferred income	<u><b>1,700</b></u>	<u>7,344</u>

**NOTES TO THE FINANCIAL STATEMENTS - CONTINUED  
FOR THE YEAR ENDED 30 SEPTEMBER 2022**

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**14. DEFERRED INCOME**

Included within creditors falling due within one year is a total of £963 (2021: £6,391) in relation to deferred income.

£556 (2021: £3,371) 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, while some amounts have been retained by the charity, for those individuals that have offered that the charity retain the relevant amounts as donations to unrestricted funds.

The remaining £407 (2021: £Nil) relates to funds received from individuals who paid for attendance at an event, but subsequently cancelled their attendance. The funds have been retained by the Charity for use by the relevant individuals at future events in 2023.

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 (2021: £3,020).

# YORKSHIRE GARDENS TRUST

## NOTES TO THE FINANCIAL STATEMENTS - CONTINUED FOR THE YEAR ENDED 30 SEPTEMBER 2022

### 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>

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 2022**

**15. MOVEMENT IN FUNDS – continued**

**Comparatives for movement in funds**

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

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

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

## **YORKSHIRE GARDENS TRUST**

### **NOTES TO THE FINANCIAL STATEMENTS - CONTINUED FOR THE YEAR ENDED 30 SEPTEMBER 2022**

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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.