

Charity registration number 800540

Company registration number 02277427 (England and Wales)

DEVON GARDENS TRUST

ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2023



LEGAL AND ADMINISTRATIVE INFORMATION

Chairman:	Susan Minter
Vice chairman:	Vacant
Treasurer:	Stephanie Berry (appointed 28 April 2021)
Membership secretary:	Elizabeth Lewis (appointed 1 March 2020)
The council of management: (In addition to those named above)	Mrs Jeryl Andrew Mr Shane Cormie Mrs Barbara Moul Mrs Virginia Parker Mr Jeremy Pearson Mr Ian Smith Mr Saul Walker
Officers of the trust:	
Patron:	The Earl of Devon
President:	Mr Michael Hickson VMH
Vice-Presidents:	Mrs Janet Anderson Dr Eric Durrance Mr Peter Hunt Mr Steven Pugsley Mrs Joy Williams MBE Ex Officio Lord Bishop of Exeter (Rt Revd Robert Attwell)
Company secretary:	Vacant
Directors:	Jeryl Andrew Susan Minter
Conservation officer:	Mr John Clark (until 28 February 2021) Mr Jonathan Lovie (from 1 March 2021)
Newsletter editor:	Dr Dianne Long
Journal editor:	Dr Clare Greener
Charity number:	800540
Company number:	02277427



LEGAL AND ADMINISTRATIVE INFORMATION

Registered office: Exeter Community Centre
17 St David's Hill
Exeter
Devon
England
EX4 3RG

Correspondence address: Exeter Community Centre
17 St David's Hill
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Accountants: Bush & Co Limited
2 Barnfield Crescent
Exeter
EX1 1QT

Bankers: NatWest Bank plc
18 St Thomas Centre
Cowick Street
Exeter
Devon
EX4 1DB

Investment brokers & custodians: Brewin Dolphin Limited
Vantage Point
Woodwater Park
Pynes Hill
Exeter
EX2 5FD



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TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE YEAR ENDED 31 MARCH 2023

The trustees present their annual report and financial statements for the year ended 31 March 2023.

The financial statements have been prepared in accordance with the charity's governing documents, the Companies Act 2006 and "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 (FRS 102)" (effective 1 January 2019).

Objectives and activities

The Trust is a company limited by guarantee and governed by Articles of Association. The Trust is also a Registered Charity.

The Objects of the Trust are to:

- Promote, for the public benefit, the protection, conservation, enhancement, research and understanding of the Designed Landscapes of Devon and
- Promote the education of the public on the arts, crafts, sciences, and all other matters connected with the heritage of those landscapes.

In fulfilling this purpose, the Trustees have complied with the duty in Section 1(5) of the Charities Act 2011 to have due regard to the guidance published by the Charities commission on public benefit.

The Directors and Trustees

The Trustees and the Directors are shown on the pages above. They are Trustees for the purposes of the Charities Act and are proposed from the body of the Membership and were elected formally at the AGM and the EGM.

Jeryl Andrew is due to retire in 2023 having served one three-year term as Trustee and is not seeking re-election. Jeremy Pearson resigned on January 20th for personal reasons having served for five and a half years. Rupert Bannister resigned on July 11th due to other commitments having served for seven months. We thank them for the contributions that they have made to the work of the Trust.



TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

Achievements and performance

My report follows the same format as last year comprising a summary of the main activities of the Trust during the year with full details of the Trust's activities in an Appendix written by the named Chairs of each of the Trust's Committees in their own words, reflecting the fact that the Trust is run by volunteers who each 'own' an area of activity and deliver upon it.

This year, the 35th year of our operation, has seen developments across all areas of our work. We have been fortunate to recruit a number of new Trustees with two appointments at last year's AGM and three at the EGM in December and these new Trustees are beginning to make a valuable contribution to the Trust's activities with fresh ideas.

In terms of grant giving, this year has seen some progress on our work with Oldway Mansion in Paignton for which we have a legacy (the Wilson Conservation Fund). Guidance in the form of a Garden Management Plan for volunteers has been commissioned and completed and a consultant has been appointed by Torbay Council to progress a Conservation Management Plan for the landscape (which is by Achille Duchêne and contains a Meyer rock garden) and to which the Trust will contribute 50%.

A grant was also made to Dartington Hall Trust for the preparation of a Conservation Management Plan. We have engaged a consultant to prepare the application for Peamore to be included on Historic England's Register and so protect this picturesque landscape from encroachment by the expanding housing estates in the Teignbridge District Council area.

We are beginning to engage more closely with Plymouth Central Park which is in need of an overarching landscape management plan due to hitherto piecemeal development. We would, however, like to be able to award more grants and so have established a New Initiatives Group to explore possible ways that this can be achieved within the terms of the Trust's charitable objects and sought legal advice to clarify this.

One area that we have been considering is how to replace the grants hitherto given for horticultural courses at colleges which are now no longer needed as they are either funded by the government (or, in the case of the RHS apprentices funded centrally). During the year we successfully launched the Professional Gardeners' Network, an initiative first proposed in 2018. Led by Trustee, Saul Walker, it is now developing an interesting programme for this year and could become a conduit for funds into specific course training and/or travel and equipment grants.

The committee is also working on reactivating following Covid a number of partnerships with organisations in the county such as Growing Devon Schools (co-ordinated by new trustee Jane Knight) and Farms for City Children. Clare Greener, the Interim Chair of the Research Committee, is now being supported by David Sykes, as Coordinator, who is working on a programme of meetings and visits.

Closer links with the Devon Rural Archive are being forged. Ed Dolphin, a trained arborist, has been recruited to lead on tree recording and its integration into site recording in succession to Marion Kneebone, whom we thank for her work on this.

The Conservation Committee is completing a Gazetteer review and refinement which should help inform planning responses and research priorities; and, due to the quantity of work required in reviewing Local Plans, a proposal for enlisting planning volunteers has been agreed.



TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

A Parks and Cemeteries programme was launched in November 2022, initially covering six parks and six cemeteries, which is an initiative to support the public parks and cemeteries in the county. This is being led by new Trustee, Paul Faulkner, and we hope will bring forward some proposals for grants.

In other developments, a new initiative was the creation of an annual Award by the Trust for innovation and creativity in the management of historic gardens. The first recipient of this award was Knightshayes for its innovative management of its walled garden. A further edition of the Journal is due out shortly and we are currently looking for someone to take the lead on Communications and to fill the role of Newsletter and eNews editor.

As a volunteer organisation we are entirely dependent on people coming forward to take on these roles. Dianne Long has undertaken this role and others very competently for some time but we need some new faces to join our organisation. Shane Cormie has been in charge of our social media presence and has coordinated the Events programme which started with a very successful Christmas event and proceeded with winter Zoom talks and visits through the summer including a joint visit and lecture with the Sid Vale Association.

We have undertaken a review of our governance documents in the last twelve months with updated Articles of Association adopted at the EGM in December 2022 and the introduction of new policies including a Code of Conduct for Trustees and a Lone Working policy. Finally, I am delighted to report that our membership numbers continue to grow with a total of 36 new members since April 2022. We now have 315 members of whom 125 are Life members.

It is with sadness that we report the deaths of Elizabeth Maycock (Life member), Ian Panton, Dr Eva Gibson, and Dr Alison Newton. Dr Gibson and Dr Newton were both Life Members for more than 30 years.

The Trustees would like to thank all members for their continued support during the past year.



TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

Conservation Committee Report

Chair: Dr Dianne Long

Planning Casework

During the period 1 April 2022 to 31 March 2023 there have been some 25 consultations affecting designed landscapes in the county of which 16 required a substantial response by the Trust acting on behalf of the Gardens Trust, the statutory consultee on all planning applications affecting sites on the Historic England (HE) Register of Parks and Gardens of Special Historic Interest in England (*Register*), there were also 3 felling license applications by the Forestry Commission, and 2 preapplications relating to sites on the Register and on the Devon Gazetteer of Parks and Gardens of Local *Historic Interest* (*Gazetteer*).

We have been encouraged that the National Trust has consulted the Trust at an early stage in its planning for work at both A la Ronde and Arlington. In the case of **A la Ronde (II)** NT set out very positive ideas for the better management of the designed landscape, including enhancing accessibility and understanding.

In respect of **Arlington Court (II*)**, NT are considering options for future management of the heavily silted lake, which is a significant element of the historic landscape design, and its loss would have a detrimental impact on the significance of the early C19 Picturesque landscape design; however, the silted area has natural environment significance (SSSI) and the solution will need to achieve a careful balance. NT was involving all stakeholders who will be consulted on the Landscape Concept Design that was being developed.

The Trust has not objected to other applications at Arlington: for a timber storage structure in the courtyard behind the house replacing and regularising an existing, untidy, informal arrangement, and proposed new woodland planting at Churchill Farm within the designated historic landscape; however, we have commented that given the wider context of changes under consideration at Arlington, we would have preferred to see them being brought forward as part of a comprehensive conservation management plan.

Bicton (I) We have submitted a firm objection to East Devon District Council on an application for an agricultural building within the parkland to the south-east of the main drive, citing the lack of appropriate supporting documentation for the proposal, and its adverse visual impact on the Grade I designed landscape. We see this as further haphazard, incremental development proposed without the benefit of an appropriate CMP for the Bicton landscape. Historic England has responded in similar terms.

Cadhay (II*) An appeal against Devon County Council's refusal of permission for the quarry at Straightgate Farm, Ottery St Mary, which it is believed will affect the water supply to the ponds forming a key element of the historic designed landscape at Cadhay and its wider estate has been upheld by the Planning Inspectorate. We are extremely disappointed by this outcome and remain very concerned for the sustainability of the garden at Cadhay. We will continue to liaise with the Cadhay as this development proceeds.

Courtlands/Lympstone Manor (Gazetteer) Revisions to address Environment Agency concerns over flood risks on a scheme for shepherds huts did not address any of the issues previously raised by the Trust or the East Devon Conservation Officer, our objection was therefore maintained.

Dartington Hall (II*) We considered a proposed residential development (first phase of two planned) adjacent to the Totnes Drive to the Dartington Estate. The proposed development site lies immediately outside the registered site boundary, but clearly within its setting (a fact addressed in the application documentation).



TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

While instinctively regretting the change to the approach to Dartington from Totnes which these developments would cause, careful examination of the historic map evidence did not suggest that the proposed development sites had ever formed part of the designed views from or towards Dartington; and the close proximity of existing housing to the north-west and south-east of the proposed development sites indicated that there were no valid planning grounds on which we might formulate an objection.

Drake Memorial Park, Plymouth (*Gazetteer*) Consideration of proposed variations to a previous scheme for the construction of an extension and crematorium on land to the north of the existing Drake Memorial Park (between it and the A38) revealed that the Park was perhaps of greater significance than previously thought. The issue on which Plymouth consulted was the potential impact on Saltram (II*) to the west.

The local topography means that any impact on the registered landscape would be negligible. However, the consultation prompted further investigation into the history and significance of the Drake Memorial Park, which was laid out in 1941 and opened in 1943 using the “lawn cemetery” principle (no upright headstones or kerbs marking burial lots).

Dr Brent Elliott (ex-librarian for the RHS Lindley Library) has advised that, based on his extensive research into cemetery design, this privately-operated cemetery is one of the earliest (and very probably the earliest) realised examples of a lawn cemetery in England – previous attempts to introduce this cemetery aesthetic by various municipal authorities having foundered due to public opposition. This enhanced understanding of the significance of the site is very helpful and will hopefully prompt further research.

Knowle, Sidmouth (*Gazetteer*) The derelict former East Devon Council offices were badly damaged by a fire on 30th March 2023. It is not known how this will affect the proposed redevelopment of the building by McCarthy Stone. Coincidentally, a revised scheme for this redevelopment was submitted shortly before the fire.

Mamhead (II*) – Obelisk Gardens (previously known as Mamhead Grange) An amended application for the siting of 14 luxury holiday lodges, the demolition of glasshouses with the retention of one glasshouse for use as a winter garden, and other associated works, has been rejected by Teignbridge District Council. The Trust advised Teignbridge that more evidence was required for the Council to determine whether or not there might be a detrimental impact on the setting of Mamhead Park.

At **Saltram (II*)** we considered that the applicant of a proposed solar farm at the north end of Chelson Meadow (the former rubbish dump site) had not addressed our concerns raised at preapplication stage.

Whereas at **Ugbrooke (II*)** we raised no objection to a revised application for a small solar array adjacent to the Old Stables within the Grade II* landscape where a much fuller historic impact assessment than previously submitted goes far in allaying both our concerns, and those of the Teignbridge Conservation Officer with regard to the potential impact of this scheme.



TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

Felling licenses

Endsleigh (I) (Forestry Commission Felling License consultation.) A detailed response was submitted to proposed felling and replanting in Leigh Wood (below the Swiss Cottage) in the heart of the Grade I designated landscape, and at another location adjacent to the Tavistock Drive within the immediate setting of the designated landscape. The proposed replanting of Sitka spruce and Douglas fir (as existing) in Leigh Wood, an area historically comprising oak woodland, together with the loss of a small number of mature oaks near the river was of particular concern. The significance of tracks within the woodland which appear to relate to Repton's landscape scheme was also highlighted.

Castle Drogo (II*) An application to fell a compartment of oak, sycamore and birch in the Teign Gorge below the Castle (but within the registered landscape) and to allow natural regeneration of the same species. This does not appear to have any adverse impact on the registered park and garden and reflects traditional forestry management in the area.

Other conservation work

Oldway (II) There was considerable engagement during the year with the various stakeholders involved at Oldway, helping to prepare a brief for the appointment of a consultant to prepare a gardens management guidance plan and a brief for a consultants to prepare a conservation management plan for the gardens.

The guidance plan was to help the Oldway Volunteer Gardeners Group (incorporated as a charity during the year) prior to the implementation of the recommendations of a CMP, particularly on the significance of particular areas and how to address designed views. The guidance plan was funded by a grant from the Trust which has also offered a grant towards the costs of the CMP.

The Trust urged Torbay Council to undertake work to the lime avenue such that it could be maintained by the Gardeners' Group in future, and to undertake a structural survey of the Grotto. Torbay Council appointed a project manager for Oldway and has recently begun consultation on the future uses for the Oldway buildings and gardens recognising that any restoration will be a long-term project.

Poltimore (Gazetteer) We have met with the chair and volunteers of the Friends at Poltmore to discuss the conservation of the grounds under their control. Given the resources available and the priorities identified by the Friends we have advised that a gardens management guidance plan, similar to that done at Oldway, would be a suitable way forward rather than a full-scale CMP. We have subsequently shared the Oldway plan and Poltmore now have a well-qualified volunteer able to develop their own plan.

Wood (I) Some members of the Conservation Committee were briefed on progress within the designed landscape. The work undertaken is of a very high standard, and the previously near derelict Mawson landscape is now substantially reinvigorated with designed views re-opened, historic structures uncovered and appropriate planting introduced.

More remains to be done, especially in the walled garden; but even here, positive change has taken place with the derelict glasshouses being recorded and dismantled and the main garden laid down to grass. The Grade II* house has been sympathetically converted to medical use and appears to have provided the whole historic environment at Wood with a beneficial use and sustainable future.



TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

This meeting was the first of an on-going dialogue in the context of further proposed restoration works. We have advised that Historic England should be engaged in discussions at an early stage.

Homeyards Botanical Gardens (*Gazetteer*) We advised the Friends of Homeyards that a structural survey of the grotto should be undertaken together with other structures in the gardens; this was completed and costings for remedial works were being sought. The Friends published a booklet on the history of the gardens written by one of its members.

Stover (II) We noted with sadness that the restoration of the 1779 stables had been removed from the NHLF funded Restoring Stover project, primarily caused by the post-COVID rise in costs. Although Historic England had offered funding, Stover School could not contribute financially to meet the deficit but intend to continue to the phase one of the project to stabilise the stables to prevent further deterioration and are keen to learn of possible funding options.

The removal of the stables from the overall project also prompted the decision to dissolve the Stover Historic Landscape Trust. The Trust agreed to make an application to The Georgian Group to add the stables to the Group's Heritage at Risk list.

Dolvin Road Cemetery, Tavistock (*Gazetteer*) We had noted with concern that the cemetery had been closed due to a fallen tree and damage to the vaults in the cemetery. Tavistock Town Council (the appropriate authority) advised us that once remedial work was completed, the site would reopen to the public.

The Italian Garden at Great Ambrook

The Conservation Committee visited the Italian Garden at Great Ambrook and was impressed with the scale of restoration that has been achieved to date. The enthusiasm of the volunteers and the commitment to work with different groups and encourage skills training was also noted. We were also pleased to hear that the garden has since received a substantial grant from the NLHF which includes restoration work to the summerhouse and limestone paths.

Peamore House (*Gazetteer*) Further research has been added to support the Trust's application to Historic England to add Peamore House to the *Register of Parks and Gardens* with emphasis on the threat of potential development as identified in the proposed Teignbridge Local Plan almost engulfing the landscape.

Conservation Grants

As noted above the Trust awarded several Conservations Grants during the year: Oldway for the preparation of a Gardens Management Guidance Plan Oldway for the reparation of a conservation management plan. Dartington Hall Trust for the preparation of a conservation management plan. The Conservation Committee has embarked on two major initiatives both of which are collaborative with the Research Group:

***Gazetteer* Review.** The objective was to undertake a thorough review of the *Gazetteer*. This has updated the criteria for inclusion of sites on the *Gazetteer* and includes a simple hierarchy that will help to inform planning responses and research priorities. The first stage of the review was to determine which sites may be under threat and require research, sites which merit further research to determine their significance, sites which might merit submitting to HE for adding to the Register, sites which should be included on the *Gazetteer* and sites which did not meet any criteria for being on the *Gazetteer*.



TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

This first stage is complete and the Research Group now has a list of sites for which research is required and an indication of priority. The second and longer-term stage of the review is to update all *Gazetteer* entries on the website to include a statement of significance which will aid consideration of planning consultations.

Parks and Cemeteries Programme The purpose of this programme is to ensure that public parks and cemeteries have in place good current conservation management plans with succession planting plans which, once in place, might trigger some grant funding from the Trust.

It was envisaged that this would be a long-term programme and a preparatory phase is underway to gather data on all the sites in the county, examine and make contact with a small number of both public parks and cemeteries that might form a first tranche and that can help identify issues to refine the programme. As with the *Gazetteer* Review this programme is working with the Research Group with Cemeteries being a research theme.

Events Committee Report

Chair: Mr Shane Cormie

Our 2023 visits started in May with a visit to Homeyards Botanical Gardens, Shaldon where previously we had donated 21 *Crataegus persimilis* 'Prunifolia Splendens' (Cockspur or Frosted thorn) to replace an old hedge. For something different, in June a group of members and their friends, inspired by the historic landscape of Sandridge Park, packed up their paints, notebooks and cameras for a Creative Art in the Landscape Day.

Later that month we headed to Marwood House and Marwood Hill Gardens for a private visit. July saw us visiting Wildside to see how the garden has developed.

Last year's AGM was held at Castle Hill where after the formalities we enjoyed a talk by Andy Jasper, National Head of Gardens and Parklands for the National Trust and a buffet lunch before time to explore this North Devon landscape. We also took the opportunity to present Lady Arran with a *Sorbus devoniensis* (Devon Whitebeam) marking her service to the Trust as Patron (2008-2020) and President (1998-2007).

One of the most popular visits in 2022 was to the Bishop's Palace Gardens, Exeter and the Cathedral Library and Archives. Following feedback from members, several visits have been restricted by numbers to give a more relaxed experience.

In May 2023 we repeated the visit to the Bishop's Palace Gardens due to demand. November saw the beginning of our talks programme this time in Cullompton with Caroline Bell enthusing us about Splendid Sasanquas: Gardening with camellias for scent.

This was followed in early December with our Christmas Social at Clyst St Mary Village Hall. This took the form of an afternoon tea and quiz and proved an excellent opportunity for members to relax and talk whilst at the same time being a little competitive.

In January Sandra Lawrence enlightened us with her Zoom talk on Miss Willmott's Ghost, the subject of her recent book. Some 43 years ago Miss Willmott was the subject of an excellent biography by Devon Gardens Trust member, Audrey le Lièvre, and this was an opportunity to hear of recent new information uncovered on Miss Willmott. In February, Abi Gray from the Devon Rural Archive gave us a talk on the history of Shilstone and what is held in the Devon Rural Archives..



TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

Where possible we have tried to select venues in different areas of our county with talks in Longdown, Clyst St Mary, Cullompton and visits to the South Hams, North Devon, West Devon and Exeter. We also consider the ease of parking, access to public transport and the comfort of the venue. We appreciate that getting all three is not always possible.

We would like to thank all our hosts and speakers for their time and expertise. A special mention goes out to our small band of volunteers who have helped make these talks and visits successful. Without your energy, enthusiasm, time and skills we would not be able to visit and discover more about Devon's (and sometimes beyond) historic landscapes and their people.

Publicity

In August we held a Devon Gardens Trust Day at Bicton Park Botanical Gardens. Thanks go to Bicton Park Botanical Gardens and our volunteers who assisted on the day by giving mini-talks on our work, encouraging everyone to take part in our quiz to enthuse them about Devon landscapes and of course talking about our work and volunteer opportunities.

Another new publicity event for us was a Volunteers' Event organised by Exeter Community Initiatives at Exeter Cathedral. A number of volunteers and trustees spread the word and welcomed several members to the stand as well as potential volunteers.

During 2022, The Gardens Trust and the County Gardens Trusts teamed up with the RHS Lindley Library to create an online exhibition on The Bicycle Boys: An unforgettable Garden Tour. This followed the travels in 1928 of young landscape architecture students, Loyal Johnson and Sam Brewster cycling around the UK visiting more than 80 unforgettable gardens.

In Devon they visited Rougemont Gardens in Exeter, Killerton and Bradfield. Content by The Gardens Trust and RHS with help from the Devon Gardens Trust and others helped increase awareness of the organisations involved as well as the social history of historic landscapes. Thank you to our researchers who assisted in this national story.

Social media

On the social media side, we continue to regularly post on Twitter and Instagram. We currently have 729 followers on Twitter and 327 on Instagram. Please follow us if you are not already and share your images of Devon gardens, parks and cemeteries. The Gardens Trust is investing in research on how the County Gardens Trusts can maximise opportunities via social media and we appreciate their assistance.

Research and Recording Committee

Chair: Dr Clare Greener

During the previous year, the Research Group has had meetings which have combined visits to the Devon Rural Archive and the Italian Garden at Great Ambrook with regular, more formal, catch-ups about on-going research, training, general items of research interest and future planning. Meetings have been held in different areas of the county to encourage a higher attendance.



TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

David Sykes has become Co-ordinator of the group and maintains regular contact with members. Essential documents and information have been shared by email. There has been a close working relationship with the Conservation Committee with members of both committees working behind the scenes to consider future priorities for research or recording. This includes identifying sixteen of the most important sites on the Gazetteer that are at risk, as a focus for future research by the team, an ongoing project on Parks and Cemeteries in the county and a possible new project on oral history.

The joint project about aspects of life in the 1920s with the Devon History Society has seen several members attend and contribute to their meetings. These have included talks on different aspects of horticulture, market gardening, growth of violets, decline in the fern craze and more. There have been talks about sharing expertise with other Garden Trusts and with local organizations such as the Devon Rural Archive.

One of our new volunteers drafted a leaflet to encourage more volunteers to join the group and encourage membership of the Trust. This will be distributed at talks by Trust members and at various appropriate venues. Looking forward to 2024 we hope to consolidate the work that is ongoing, which includes updating our filing system, writing up reports on sites and to reinstate tree recording and integrate that work with other recording projects.

With the growing demand for research, a particular focus will need to be on the recruitment of new members if there is to be any chance of fulfilling all the demands on the group. Meetings, both face to face and on Zoom, will continue with some being opened up to all members of the Trust.

Education Committee Report

Chair: Mr Rupert Bannister

Supporting Education, Life-long Learning and Continuing Professional Development

The Professional Gardeners' Network was launched at a very well attended meeting held at RHS Rosemoor. A brainstorm of desired training was completed and the initial year promised a machinery day at Saltram run jointly with Devon Garden Machinery and a day on summer pruning at Rosemoor.

One key point from a subsequent Education Committee meeting was that education has the opportunity to be more 'inward looking' to support industry requirements within the county. There are also potential routes for supporting wider elements of horticulture education through connections with Growing Devon Schools and Farms for City Children (see below) and via connections with the RHS schools programmes, especially secondary schools where career choices are made. The new Education Chair agreed to arrange conversations with Sue Moss (RHS education lead) regarding connections with secondary schools for education and awareness.

Three members of the Education Committee visited Farms for City Children (Michael Morpurgo's charity with Devon base at Nethercott House close to Rosemoor) February 2023 to meet the farm manager. DGT offered support with possible funding for a trainee in the historic walled garden and advice on training requirements for heritage programme contents. There might be the possibility of co-funding this via the RHS Flourish Fund. A visit for DGT members was thought possible at a weekend. Advice was offered about how they could successfully open to the public on specific days.

New Trustee Jane Knight has agreed to re-establish contact with Growing Devon Schools as there was no real connection during the Covid pandemic. The relationship to date has primarily been financial support for them to run teacher training days across Devon.



TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

Financial Review

As of 31 March 2023, the Trust's reserves amounted to £326,164 (2022: £357,964) of which £124,313 are Restricted Funds (Wilson Conservation Fund). The Restricted Funds originate from the John Wilson legacy designated to be used for the restoration and conservation of important Devon gardens with priority to be given to the restoration of Oldway Mansion, Paignton's original landscape designed by Achille Duchêne.

The balance of Unrestricted Funds is to be used for the normal activities of the Trust.

The summary income and expenditure account, produced for circulation to members, is included on the following pages. The activities for the year generated a net movement in funds of £(31,800) (2022: surplus of £107) which included investment losses of £21,344 (2022: gain of £16,895). The investment portfolio value fell by 3.59% in the 12 months to 31 March 2023, with 2022 proving to be a challenging year for investors, with the war in Ukraine, high inflation, rising interest rates and the growing risk of a global recession creating instability for financial markets. The Trustees regularly review the investment performance and carry out an annual review of Brewin Dolphin's mandate.

In this financial year the Trust awarded a first grant of £3,108 to Oldway from the Wilson Conservation Fund for the appointment of a consultant to prepare a garden management guidance plan. General expenditure for the year was in line with 2022.

The Trust's expenditure on operating costs is stable but always exceeds its income.

To ensure that DGT has sufficient operating funds and is able to respond to any unforeseen challenges the Trust maintains a level of reserves of twice the average annual expenditure in the General Fund of the Unrestricted Funds (£56,636). The balance of the Unrestricted Funds (£145,215), held in the Designated Fund, is available for expenditure in line with the Trust's objectives.

This year a New Initiatives Group was formed to explore ways to award more grants as the Trust remains well financed.

The trustees' report was approved by the Board of Trustees.

Ms S A Minter
Chairman

14 July 2023



STATEMENT OF TRUSTEES' RESPONSIBILITIES

FOR THE YEAR ENDED 31 MARCH 2023

The trustees, who are also the directors of Devon Gardens Trust for the purpose of company law, are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company Law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.



**STATEMENT OF FINANCIAL ACTIVITIES
INCLUDING INCOME AND EXPENDITURE ACCOUNT
FOR THE YEAR ENDED 31 MARCH 2023**

		Unrestricted funds 2023 £	Restricted funds 2023 £	Total Unrestricted funds 2023 £	Restricted funds 2022 £	Total 2022 £
	Notes					
Income from:						
Incoming resources	2	8,554	-	8,554	5,031	5,031
Investments	3	6,089	2,682	8,771	4,869	7,035
Total income		14,643	2,682	17,325	9,900	12,066
Expenditure on:						
Resources expended	4	23,724	4,057	27,781	27,806	28,854
Net gains/(losses) on investments	8	(14,792)	(6,552)	(21,344)	11,693	16,895
Net movement in funds		(23,873)	(7,927)	(31,800)	(6,213)	107
Fund balances at 1 April 2022		225,724	132,240	357,964	231,937	357,857
Fund balances at 31 March 2023		201,851	124,313	326,164	225,724	357,964

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

The notes on pages 16 to 24 form part of these financial statements.

DEVON GARDENS TRUST



BALANCE SHEET

AS AT 31 MARCH 2023

	Notes	2023		2022	
		£	£	£	£
Fixed assets					
Tangible assets	10		284		1,706
Investments	11		308,205		335,448
			<u>308,489</u>		<u>337,154</u>
Current assets					
Stocks	12	1,222		1,963	
Debtors	13	628		578	
Cash at bank and in hand		21,203		31,061	
		<u>23,053</u>		<u>33,602</u>	
Creditors: amounts falling due within one year	14	<u>(5,378)</u>		<u>(12,792)</u>	
Net current assets			<u>17,675</u>		<u>20,810</u>
Total assets less current liabilities			<u><u>326,164</u></u>		<u><u>357,964</u></u>
Income funds					
Restricted funds	15		124,313		132,240
<u>Unrestricted funds - general</u>					
Designated funds	16	145,215		163,724	
General unrestricted funds		<u>56,636</u>		<u>62,000</u>	
			<u>201,851</u>		<u>225,724</u>
			<u><u>326,164</u></u>		<u><u>357,964</u></u>



DEVON GARDENS TRUST

BALANCE SHEET (CONTINUED)

AS AT 31 MARCH 2023

The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 March 2023.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 14 July 2023

Ms S A Minter

Trustee

Company registration number 02277427



NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1 Accounting policies

Charity information

Devon Gardens Trust is a private company limited by guarantee incorporated in England and Wales. The registered office is Exeter Community Centre, 17 St David's Hill, Exeter, Devon, EX4 3RG, England.

1.1 Accounting convention

The financial statements have been prepared in accordance with the charity's articles of association, the Companies Act 2006, FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS 102") and the Charities SORP "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 (FRS 102)" (effective 1 January 2019). The charity is a Public Benefit Entity as defined by FRS 102.

The charity has taken advantage of the provisions in the SORP for charities not to prepare a Statement of Cash Flows.

The financial statements are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

1.2 Going concern

At the time of approving the financial statements, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

1.4 Income

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Cash donations are recognised on receipt. Other donations are recognised once the charity has been notified of the donation, unless performance conditions require deferral of the amount. Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.



NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

1 Accounting policies

(Continued)

Legacies are recognised on receipt or otherwise if the charity has been notified of an impending distribution, the amount is known, and receipt is expected. If the amount is not known, the legacy is treated as a contingent asset.

1.5 Expenditure

Expenditure is recognised once there is a legal or constructive obligation to transfer economic benefit to a third party, 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 classified by activity. The costs of each activity are made up of the total of direct costs and shared costs, including support costs involved in undertaking each activity. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs which contribute to more than one activity and support costs which are not attributable to a single activity are apportioned between those activities on a basis consistent with the use of resources. Central staff costs are allocated on the basis of time spent, and depreciation charges are allocated on the portion of the asset's use.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Computers	25% Straight Line
-----------	-------------------

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in the statement of financial activities.

1.7 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs, and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in net income/(expenditure) for the year. Transaction costs are expensed as incurred.

Restricted investments indicate investments held at market value as at the year end, as a result of the restricted legacy income received.



NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

1 Accounting policies**(Continued)****1.8 Stocks**

Stocks are stated at the lower of cost and estimated selling price less costs to complete and sell. Cost comprises direct materials and, where applicable, direct labour costs and those overheads that have been incurred in bringing the stocks to their present location and condition. Items held for distribution at no or nominal consideration are measured the lower of replacement cost and cost.

Net realisable value is the estimated selling price less all estimated costs of completion and costs to be incurred in marketing, selling and distribution.

1.9 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

1.10 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the charity's balance sheet when the charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

2 Incoming resources

	2023	2022
	£	£
Subscriptions	4,533	3,350
Gift aid	645	1,005
Donations	416	19
Events, including AGM	2,809	446
Book sales	151	211
	<u>8,554</u>	<u>5,031</u>



NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

3 Investments

	Unrestricted funds general 2023 £	Restricted funds 2023 £	Total 2023 £	Unrestricted funds general 2022 £	Restricted funds 2022 £	Total 2022 £
Income from listed investments	6,089	2,682	8,771	4,869	2,166	7,035

4 Resources expended

	2023 £	2022 £
Depreciation and impairment	1,422	1,704
Administration	405	228
Office rent & service charge	1,648	1,633
Publicity & marketing	1,105	1,510
Bursaries & grants	1,000	662
Conservation - grants awarded	3,108	11,400
Conservation - committee expenses including officer	3,904	3,684
Research & recording	486	152
Events, including AGM	4,310	1,065
Publications - journal & newsletter	1,489	660
Subscriptions & sundries	223	141
Insurance	680	641
Accountancy	2,028	1,814
Investment management fee	3,082	3,403
Book expenses	731	157
Legal & professional fees	2,160	-
	<u>27,781</u>	<u>28,854</u>
Analysis by fund		
Unrestricted funds - general	23,724	27,806
Restricted funds	4,057	1,048
	<u>27,781</u>	<u>28,854</u>



NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

5	Net movement in funds	2023	2022
		£	£

Net movement in funds is stated after charging/(crediting)

Depreciation of owned tangible fixed assets	1,422	1,704
	<u> </u>	<u> </u>

6 Trustees

Expenses of £1,030 were reimbursed to Trustees during the year for undertaking charitable activities (2022: £136). No remuneration was paid to any members or Directors. (2022: £Nil)

7 Employees

The average monthly number of employees during the year was:

	2023	2022
	Number	Number
Total	-	-
	<u> </u>	<u> </u>

There were no employees whose annual remuneration was more than £60,000.

8 Net gains/(losses) on investments

	Unrestricted funds general 2023 £	Restricted funds 2023 £	Total 2023 £	Unrestricted funds general 2022 £	Restricted funds 2022 £	Total 2022 £
Revaluation of investments	(25,308)	(11,230)	(36,538)	4,389	1,953	6,342
Gain/(loss) on sale of investments	10,516	4,678	15,194	7,304	3,249	10,553
	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	<u>(14,792)</u>	<u>(6,552)</u>	<u>(21,344)</u>	<u>11,693</u>	<u>5,202</u>	<u>16,895</u>

9 Taxation

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



NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)
FOR THE YEAR ENDED 31 MARCH 2023

10 Tangible fixed assets

	Computers £
Cost	
At 1 April 2022	6,816
At 31 March 2023	6,816
Depreciation and impairment	
At 1 April 2022	5,110
Depreciation charged in the year	1,422
At 31 March 2023	6,532
Carrying amount	
At 31 March 2023	284
At 31 March 2022	1,706

11 Fixed asset investments

	Listed investments £
Cost or valuation	
At 1 April 2022	335,448
Additions	90,317
Valuation changes	(36,538)
Disposals	(81,022)
At 31 March 2023	308,205
Carrying amount	
At 31 March 2023	308,205
At 31 March 2022	335,448



NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

11 Fixed asset investments **(Continued)**
Fixed asset investments revalued

All investments are listed on a recognised stock exchange.

At the year end, cash held as part of the investment portfolio was £13,228 (2022: £21,704). This is included in cash at bank on the balance sheet.

12 Stocks	2023	2022
	£	£
Stock	1,222	1,963
	<u> </u>	<u> </u>
13 Debtors	2023	2022
	£	£
Amounts falling due within one year:		
Prepayments and accrued income	628	578
	<u> </u>	<u> </u>
14 Creditors: amounts falling due within one year	2023	2022
	£	£
Accruals and deferred income	5,378	12,792
	<u> </u>	<u> </u>

DEVON GARDENS TRUST



NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

15 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Movement in funds				Movement in funds				
	Balance at 1 April 2021	Incoming resources	Resources expended	Revaluations, gains and losses	Balance at 1 April 2022	Incoming resources	Resources expended	Revaluations, gains and losses	Balance at 31 March 2023
	£	£	£	£	£	£	£	£	£
Wilson Conservation Fund	125,920	2,166	(1,048)	5,202	132,240	2,682	(4,057)	(6,552)	124,313

This fund represents a legacy and must be utilised for the restoration and conservation of important Devon gardens, with priority given to the restoration of Oldway Mansion Paignton's original landscape design by Achille Duchêne.



NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

16 Designated funds

The income funds of the charity include the following designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes:

	Balance at 1 April 2021	Transfers	Revaluations, gains and losses	Balance at 1 April 2022	Transfers	Revaluations, gains and losses	Balance at 31 March 2023
	£	£	£	£	£	£	£
Designated Fund	170,245	(18,214)	11,693	163,724	(3,717)	(14,792)	145,215
	<u>170,245</u>	<u>(18,214)</u>	<u>11,693</u>	<u>163,724</u>	<u>(3,717)</u>	<u>(14,792)</u>	<u>145,215</u>

This fund represents investments owned by the Trust, initially purchased following the receipt of a legacy. Some of the income and gains are used for conservation and education grants and for the publication of research.

17 Analysis of net assets between funds

	Unrestricted funds 2023	Restricted funds 2023	Total 2023	Unrestricted funds 2022	Restricted funds 2022	Total 2022
	£	£	£	£	£	£
Fund balances at 31 March 2023 are represented by:						
Tangible assets	284	-	284	1,706	-	1,706
Investments	213,309	94,896	308,205	232,164	103,284	335,448
Current assets/(liabilities)	(11,742)	29,417	17,675	(8,146)	28,956	20,810
	<u>201,851</u>	<u>124,313</u>	<u>326,164</u>	<u>225,724</u>	<u>132,240</u>	<u>357,964</u>

18 Related party transactions

There were no disclosable related party transactions during the year (2022 - none).



SUMMARY INCOME AND EXPENDITURE ACCOUNT
FOR THE YEAR ENDED 31 MARCH 2023

	2023	2022
	£	£
Income		
Subscriptions	4,533	3,350
Gift aid	645	1,005
Donations	416	19
Events, including AGM	2,809	446
Book sales	151	211
Income from Investments	8,771	7,035
	<hr/>	<hr/>
Total Income	17,325	12,066
	<hr/> <hr/>	<hr/> <hr/>
Expenditure		
Depreciation and impairment	1,422	1,704
Administration	405	228
Office rent & service charge	1,648	1,633
Publicity & marketing	1,105	1,510
Bursaries & grants	1,000	662
Conservation - grants awarded	3,108	11,400
Conservation - committee expenses including officer	3,904	3,684
Research & recording	486	152
Events, including AGM	4,310	1,065
Publications - journal & newsletter	1,489	660
Subscriptions & sundries	223	141
Insurance	680	641
Accountancy	2,028	1,814
Investment management fee	3,082	3,403
Book expenses	731	157
Legal & professional fees	2,160	-
	<hr/>	<hr/>
Total Expenditure	27,781	28,854
	<hr/> <hr/>	<hr/> <hr/>
Gains/(Losses) on Investments	(21,344)	16,895
	<hr/>	<hr/>
Net Movement in Funds	(31,800)	107
	<hr/> <hr/>	<hr/> <hr/>
Funds Brought Forward	357,964	357,857
	<hr/>	<hr/>
Funds Carried Forward	326,164	357,964
	<hr/>	<hr/>

**SUMMARY INCOME AND EXPENDITURE ACCOUNT (CONTINUED)****FOR THE YEAR ENDED 31 MARCH 2023**

Bank current account	7,975	9,357
Brewin Dolphin account	13,228	21,704
Investments at Market Value	308,205	335,448
Fixed Assets	284	1,706
Stock	1,222	1,963
Prepayments	628	578
Accruals	(5,378)	(12,792)
	<hr/>	<hr/>
	326,164	357,964
	<hr/> <hr/>	<hr/> <hr/>

Notes

1. The Trust is a Company limited by guarantee, with charitable status.
2. This abbreviated financial statement is produced for circulation to the Members. A copy of the full accounts prepared in accordance with the requirements of the FRS 102, the Charities Act 2011 and the Companies Act 2006 is held by the treasurer