

COMPANY NUMBER: 02651007

CHARITY NUMBER: 1010787

**REPORT AND FINANCIAL STATEMENTS**

**YEAR ENDED 30 SEPTEMBER 2022**

**FOR**

**SURREY GARDENS TRUST**

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## Report of the trustees for the year ended 30 September 2022

The trustees are pleased to present their report together with the financial statements of the charity for the year ended 30 September 2022.

### Reference and administrative details

PRESIDENT Dame Penelope Keith CBE DL

### DIRECTORS AND TRUSTEES

The directors of the charitable company (the charity) are its trustees for the purpose of charity law and throughout this report are collectively referred to as the trustees. The trustees serving collectively as 'Council' during the year and at year end were as follows:

|                      |                                     |
|----------------------|-------------------------------------|
| Mrs S F Dickinson    | (Chair)                             |
| Mr M H Craft         | (Membership Secretary)              |
| Mrs L Creaye-Griffin | (Secretary) (Co-opted January 2022) |
| Mr D W Hanson        | (Hon Treasurer)                     |
| Lady G B Leggatt     |                                     |
| Ms B J Lewis         | (Company Secretary & Vice-Chair)    |
| Mrs S A Sticpewich   |                                     |
| Mrs A I F White      |                                     |
| Ms M D Woodward      |                                     |

REGISTERED OFFICE: 35 Station Approach  
West Byfleet  
Surrey KT14 6NF

REGISTERED NUMBER: 02651007

REGISTERED CHARITY NO: 1010787

BANKERS: HSBC UK Bank plc  
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Leatherhead KT22 7AR

Scottish Widows Bank plc  
PO Box 12757  
67 Morrison Street  
Edinburgh EH3 8YJ

Barclays Bank PLC  
Guildford Branch  
West Surrey Group  
P O Box 317  
Woking GU21 1WT

INDEPENDENT EXAMINER: Chris MacAskill  
Braywood Ltd  
Chartered Certified Accountants  
35 Station Approach  
West Byfleet KT14 6NF

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

The Council presents its annual report and the financial statements for the year ended 30 September 2022. The Surrey Gardens Trust (the Trust) is a company limited by guarantee and not having a share capital and is a registered charity. Members are unlimited in number. The Trust is a member of the Gardens Trust, which was launched in July 2015 by the merger of the Association of Gardens Trusts with the Garden History Society.

### **The Council**

There have been six meetings during the year. We have returned to in person meetings at West Horsley Village Hall but with Zoom links enabling Trustees unable to travel to join the discussion virtually. The work of the Trust is progressed by five on-going committees: Events; Gateway; Research and Recording; Communications and Schools.

### **Objects of the Charity**

A summary of the objects of the charity as set out in its governing document:

To promote the education of the public in matters connected with the arts and sciences of garden land; and

To preserve, enhance and re-create for the education and enjoyment of the public, whatever garden land may exist or have existed in and around the County of Surrey.

### **Finance**

In financial terms this was a quite remarkable year in which we received the most wonderful support from our members, past and present. Dr Mary Caroe, a Trustee from our founding in 1991 until she passed away in 2020, bequeathed us a generous legacy of £14,000 and her family requested that In Memoriam donations at her Memorial Service, which was held this year, should also come to the Trust. £2,000 has been applied to support our Gateway Garden visits, an activity created for us by Mary. The next plan is described later in this report.

As last year three members each contributed £500 towards our Schools Awards programme and with the proceeds of a fundraising day at Dunsborough Park also added to our planned budget, a total of £6,225 was awarded to 40 schools. A similar commitment is planned for 2023.

Across the year our Events Committee created a programme of lectures and garden visits, which is described in full later in this report. It was very well received by our members and produced a surplus of over £2,000. On all measures 'Le Petit Tour' to three gardens in Somerset was the highlight.

Finally, another donation of £500 arrived from an anonymous donor in August.

As recorded in the Balance Sheet, the Unrestricted Funds of the charity now amount to £42,000, in addition to which we hold Restricted Funds of nearly £5,000 to support our Gateway Garden visits and our Garden Database work. These reserves stand well above the minimum level considered appropriate by the Trustees and provide ample scope for the increased activity that is being planned

The Trustees remain grateful that all of the Trust's work across all the activities described in this report are undertaken by volunteers, who give generously of their time and skills, while limiting our administration costs.

### **Financial Reserves**

Council has considered that the Trust should hold general reserves of not less than £15,000 because of the risks to its income, which had been significantly dependent on grants from individual local authorities, which have now ceased. Council monitors the situation carefully,

### **Risk Management**

The Trust's activities are constrained by the level of its resources. Council members consider that any risks are commensurately constrained. Council has examined these risks and confirms that systems are in place to mitigate them, should the occasion arise. Employer's Liability Insurance is taken out to provide protection for volunteers working under the Trust's direction. Council undertakes a Risk Assessment in relation to each event arranged for the Trust's members and guests, following guidelines provided by the Gardens Trust.

### **Public Benefit**

Trustee training is by the handout of relevant information and by mentoring by established trustees. In addition new guidance is circulated to the trustees. All decisions by Council are made with the Objects of the charity in mind. Lectures and courses as well as garden visits are organised on an educational basis and the development of school grounds for education and for enjoyment is promoted by means of the annual Schools Awards scheme.

The Gateway Garden Project provides an opportunity for those disadvantaged by physical and/or learning difficulties and those who care for them, to visit some of Surrey's wonderful gardens.

Information gained by research and recording of historic designed landscapes and gardens is made available to the public wherever possible. The Trust's website includes a comprehensive list, images and interactive links to the 42 gardens, parks and cemeteries of national significance in Surrey. Our work is ongoing and we aspire and work towards providing access to a comprehensive database of research relating to parks and gardens of local heritage interest.

The Trust co-operates and assists with restoration, re-creation, maintenance and management of gardens and landscapes in response to specific requests.

### **Membership and Events**

Membership at the end of the financial year was 195. 9 new members joined the Trust during the year. Once again, this number is offset by members we have lost (26 members over the year including sadly the death of 1 member). It continues to be a priority for the Trust to consider ways of encouraging increased membership across a diverse audience.

Our thrice rescheduled study day focusing on three seminal works of Sir Geoffrey Jellicoe finally proceeded in the form of a three-part online lecture series, *A People's Elysium: Geoffrey Jellicoe's Brave, New and Bold Public Landscapes*, in October 2021. The Trust thanks the four speakers, Cherrill Sands, Annabel Downs, Ed Bennis and Kate Harwood for their patience and excellent presentations. Participants in the series gained valuable insight into Jellicoe's work at the Kennedy Memorial Landscape at Runnymede, the Cadbury Factory at Moreton Marsh and the water gardens at Hemel Hempstead, all of which are now on the Historic England *Register of Parks and Gardens of Special Historic Interest*. A total of 54 people signed up for the series and the Trust made £350 in profit, thanks in part to the generous donation by Kate Harwood of her speaker's fee.

Also in October, the Trust partnered with the Gardens Trust in its 'Unforgettable Gardens' online series, highlighting four gardens in Surrey that were deemed to be particularly noteworthy. These gardens were Sutton Place, Munstead Wood, The Peace Garden at the Muslim Burial Ground and Albury Park. The Trust was especially delighted that three of these four gardens were researched and presented on by SGT members, Cherrill Sands, Elizabeth Cuttle and Jan Clark. Each of the lectures had high numbers of participants, ranging from 130 to 150, and were well received by their audience. We couldn't have been prouder and thank all the speakers for their diligent research, beautifully illustrated talks and the time they had committed to putting their presentations together. The Trust received £798 as its share of the net proceeds of these lectures hosted by the Gardens Trust.

These recordings will become an invaluable resource for the Trust and we are grateful to the speakers for allowing us to retain these recordings for such purposes. We believe this is an excellent way to deliver research completed by the Trust and intend to build on this for the future.

For the second year running the Trust was forced to postpone its AGM, originally scheduled to be held in-person at Great Bookham, due to continuing health concerns resulting from the pandemic. We held our AGM online in late January and used the polling functions on Zoom to approve various resolutions.

Over the winter months the Trust continued to hold its lecture series online having polled members about their preferences. The use of Eventbrite meant that we were able to attract non-member participants thus increasing our reach and revenue.

Our winter lecture series focused on the impact of climate change on the environment and historic gardens and landscapes in particular. We were delighted to have eminent speakers join us, giving us a useful insight into the challenges they face and their plans to minimise or combat the effects of climate change in the gardens for which they are responsible. Head Gardener Troy Scott-Smith opened our series talking about the daunting task of conserving Vita Sackville West and Harold Nicholson's Delos garden at Sissinghurst. Troy and world-renowned garden designer Dan Pearson restored this garden through careful research into Vita's plant records and notes, combined with trips to Delos in Greece to record the types of plants that grew best in that environment. Reimagining that landscape in the English countryside was definitely challenging,

Our second lecture was given by Ed Ikin, Director of Wakehurst, on '*Experimentation, Research and Storytelling at Wakehurst: Kew's Wild Botanic Garden*'. Ed explored the biodiversity at Wakehurst, a mosaic of different habitats and landscape types, and how experimentation and research is used there to explore how landscapes can adapt to and mitigate climate change.

Next, National Trust Conservation Manager Jo Barnes explored the role of water features in historic gardens, how climate change is likely to impact them and what scope there is for adaptation. After our recent summer of drought, high temperatures and for some a hosepipe ban, memories of Jo's talk hopefully struck a chord with many and will result in more drought-tolerant planting, conservation of rainwater and more sustainable measures all round. We thank these speakers for sharing their knowledge and experiences with us.

Viewing numbers for these lectures were slightly lower than in previous years due to increased choice, some Zoom fatigue and more people choosing to watch on catch-up. Notwithstanding lower numbers, the Trust still earned a profit of £167 on the winter lecture series. In 2023 the Trust intends to continue with online lectures for the winter months,

In May, we had hoped to hold our first in-person talk with Vanessa Berridge on *Borde Hill: A Plant Hunter's Paradise*. Sadly bookings were extremely low leading us to reschedule the discussion to an online evening talk. This change yielded 60 participants including 17 non-members and a profit of £176. Many members may recall that Vanessa gave our very first online lecture on Kiftsgate in October 2020. We were delighted to welcome her back and to learn more about the history of Borde Hill having visited the garden in September 2020.

Our garden visits programme for the year began with a visit in October 2021 to Ramster in Chiddingfold to admire the autumn colours. The acers certainly did not disappoint with their vast array of colours and it is always terrific to see yet another generation, the fourth, take over the reins of an historic landscape. Continuing with viewing gardens at their seasonal best, we visited Arundel Castle gardens in late April at the peak of their tulip festival. Our guide excelled at discussing the history of the garden and recent developments including the restoration of the stew ponds.

Those on the previous year's waiting list were able finally to visit Goddards and had an informative tour of the house by members of the Lutyens Trust in June. Also in June the Trust was invited to the five acre gardens of Little Priory by owner Liz Ramsay. Truly stunning views, remnants of its Victorian past and the splendid restoration of the walled fruit and vegetable garden, including its greenhouses, provided much to be admired,

The highlight of the summer was 'Le Petit Tour' of Iford Manor, Hestercombe and Yeo Valley Organic gardens organised so beautifully and attended by 25 members. Our three-day adventure was blessed with outstanding weather, with two other features making this an outstanding trip. First, the guided tours led either by the owners or skilled gardeners at each of these gardens were entertaining, informative and pitched perfectly. The passion for these places exemplified by William Cartwright-Hignett at Iford Manor and Sarah Wain at Yeo Valley was infectious. At Iford and Hestercombe we saw a high attention to detail and commitment to retaining the history, whilst acknowledging the need to adapt to the current environment and the needs of their visitors. But the best part of the trip was the extended time all participants had to get to know each other better – shared meals, car journeys and walks helped to create a stronger bond. This is hard to replicate at two-hour garden visits, so we hope to offer more opportunities such as this in the future.

Our final visits of the year were to Marble Hill House in Twickenham and Parsonage Farm near Billingshurst. Members were able to see first-hand the impressive restoration works at Marble Hill House through a combined house and garden guided tour. Once again these tours were highly informative and led by knowledgeable English Heritage guides. The gardens are a rare surviving example of a significant transition in gardening styles at the end of the 17<sup>th</sup> century. Continuing restoration work means repeat trips will be worthwhile.

The impressive gardens at Parsonage Farm are a recent creation, developed by the owners over the past 25 years, but certainly referencing the 18<sup>th</sup> century concept of a *ferme ornée*, or ornamental farm. Their 'vision' of the garden has included the planting of over 20,000 trees and the creation of long avenues throughout featuring Holm oak, yew and limes.

We hope these visits continue to enrich members' knowledge of the extraordinary history of English gardens and designed landscapes and demonstrate how more recent gardens are rooted in this knowledge whilst adapting to current trends and environmental challenges.

### **Gateway Garden Visits**

We are delighted to report that the Gateway project had a very successful year with nine visits organised and only one cancelled due to covid. They took place under scorching skies and in downpours; it was a summer of contrasts. We have been particularly pleased to attract two new groups, the Halow project in Guildford and Parkside based in Aldershot. The Halow project supports youngsters aged 16+ with a learning disability on their journey into adult life. Parkside provides support services to children and adults with autism or learning disabilities.

Our regulars such as the Meath Home for Epilepsy in Godalming and Cherry Trees in West Horsley also enjoyed visits. Other groups have had ongoing difficulty with recruiting enough staff to enable visits to go ahead, but are still very much in the scheme and hoping to re-join next year.

The benefits of our visits are many and various. Watching the young and old interact in calm, welcoming, safe spaces is a joy. The leaders and carers are to be applauded for their incredible enthusiasm, dedication and wisdom, guiding their charges and introducing them to new experiences. The ladies of Parkside, on their first ever visit to a garden, voted overwhelmingly to come again. These simple quotes from youngsters after the Halow visit to Ramster are heart-warming:

*Will – “I like looking at new things. It is amazing what Miranda has done with her garden. When you walk up and down again you get to look at lots of new things.”*

*Harriet – “I liked walking in the fresh air. I like seeing sheep in the field.”*

*Alex – “I loved the sculptures and seeing the dragon bench but my favourite is the one like Maverick from Top Gun – the vulture.”*

*Ed – “There’s a lot of colour and the sculptures were interesting. I like the purple flowers in the Tennis Court Garden.”*

Gardens visited this year were Sleepy Hollow, Loseley, Grattons, Ramster, Westbrook, Hydon End and West Horsley Place. Some are public gardens, others private, but in every case we were made welcome by the owner or head gardener who gave generously of their time, patience and wisdom. Splendid refreshments were on offer and always appreciated, particularly on a very wet day in September when we were treated to a beautifully laid out tea in a large dining room. Equally, jugs of iced drinks were most welcome on scorching days in August.

Our thanks go to all our generous hosts and to the Gateway team. We look forward to an even larger programme of visits in 2023.

### **Surrey Head Gardeners Network**

In September, we held an inaugural meeting of a new Surrey Head Gardeners Network at Ramster, Chiddingfold. Miranda Gunn and Tom Wells, owner and head gardener (respectively) at Ramster, very kindly agreed to host this first meeting. Eleven head gardeners from historic gardens across the county signed up for the event and we welcomed seven on the day. The feedback was extremely positive and further events are being discussed.

The intent is to bring together head gardeners across the county on a regular basis. The overall objective is to provide a supportive forum to share experiences, ideas and challenges which affect head gardeners in their local environments, with varying levels of support – and to address wider issues affecting the horticultural industry as a whole, such as climate change, skills and training. Going forward the Trust will provide help with speakers, venues and refreshments as needed.

We also hope that this will allow for conversations to develop between Surrey Gardens Trust, whose mission it is to help protect historic landscapes across the county, and the head gardeners who are at the very heart of their custodianship. A mutually supportive environment can nurture great things.

### **Queen’s Green Canopy Platinum Jubilee: Let’s Plant a Tree**

In April 2022, we launched a Let’s Plant a Tree competition in support of the Queen’s Green Canopy Platinum Jubilee initiative for SGT members to sponsor the sustainable planting of a tree or trees within a green space in Surrey which opens to the public. We invited applicants to write 200 - 300 words explaining where they would like to plant, why and how the proposed tree planting will be maintained for the enjoyment of generations to come. Winning entries would receive an award to buy the tree(s), plant and stake them and put in place a maintenance proposal.

We were delighted to give our award to Farnham Museum garden following an application from their team of seven gardening volunteers who meet weekly to care for the garden. The garden was restored to a new design in 2008 and is thriving apart from two of the fruit trees. The award will replace these two trees, which are a key element of the overall design. We look forward to reporting on progress once the trees are planted in late November.



### **Gertrude Jekyll Projects**

Our Research and Recording Group continued their desk top research into the gardens which appear on the Surrey Jekyll gardens list. The research has also focused on those involved with these gardens. Who were the owners, architects and head gardeners involved in their creation? A body of research is emerging and will in due course form the basis of a new publication about Gertrude's Jekyll's work in Surrey. The generous legacy left by Mary Caroe will enable this project.

Busbridge Parish Council has opened a new Yew Tree Café in the Busbridge churchyard where Gertrude Jekyll and members of her family are buried. Their grave was designed by Sir Edwin Lutyens who also designed the War Memorial in the churchyard. We have commissioned a noticeboard for the café which explains the Jekyll and Lutyens connection and the significance of these memorials.

### **Local List Digital Archive**

Throughout the year we have been working with SDS & IA Group to create a working database to facilitate the work of the Research and Recording Group as they advance the Local Heritage List project, discussed below (Research and Recording).

### **Small Grants Scheme**

Apart from the noticeboard at Busbridge we have not awarded any small grants in this financial year, but we are in conversation with applicants and anticipate granting two awards before the calendar year end. It remains a key objective to promote our small grants scheme.

### **Schools: Annual Schools Awards**

The Trust received over 40 applications from Primary, Junior, Infant and Nursery schools in Surrey.

Initially £5,500 was allocated for awards, made up of £4,000 from the Trust's general funds and £1,500 from three generous donors each giving £500. Another £725 was added thanks to money raised from selling teas and cakes at the Dunsborough Tulip Festival. As in previous years, Squires Garden Centres kindly donated £20 garden vouchers which were given to ten schools.

This year applicants were asked to provide a detailed breakdown of their project costs. If the project was modest, we were able to give the full amount, while for larger projects we identified an area to which we could contribute in a meaningful way. In total, 40 schools received an award.

We have received photographs from schools for our website and social media and this year we were once again able to visit some of the schools. More information is available on our website at:

[Schools — Surrey Gardens Trust](#)

### **Research and Recording**

Work on the Local List project, the inclusion of historic parks and gardens as heritage assets within Local Plans, has continued with six Surrey Districts. This involved a huge amount of work, with regular Zoom meetings as every site was checked against the agreed criteria. The group considered 188 potential sites, finally nominating 116 which were sent to the project leader by the closing date of 16 November 2021. These consisted of 13 sites in Elmbridge, 10 in Epsom and Ewell, 42 in Mole Valley, 13 in Surrey Heath, 28 in Tandridge and 10 in Woking. Work continued on producing summary reports well into 2022.

The project was extended until November 2022 and individual authorities are examining their lists and deciding on future consultations. We wait to hear how many of our nominated parks and gardens are to be recognised as locally significant and included on these authorities' local lists. This is important as it provides a level of protection to these historic landscapes and ensures they are considered in future planning applications. Having undertaken this extensive project, we feel it is vital to capture all our research and ensure it is easily accessible. To this end, we are taking steps to develop a digital research archive.

In November 2021 we first heard about a joint project between the RHS and the Gardens Trust, involving various County Gardens Trusts. The RHS had been given the diary of an American landscape gardener, Loyal Johnson, who with his friend Sam Brewster, visited many UK gardens in 1928. He wrote up his visits, which included references to head gardeners, made sketches and took photographs. The outcome of the collaboration was an online exhibition, focusing on a number of gardens visited by Johnson. County Gardens Trusts were requested to nominate a garden in their area and to provide additional material about the garden. Of the gardens visited in Surrey, Polesden Lacey seemed the most appropriate so with the blessing of the National Trust we put it forward, together with detailed information about the head gardener at the time, Mr Twinn. The RHS produced an article about the forthcoming exhibition in *The Garden*, April 2022 entitled, '80 gardens, 3 months, 2 bicycles, 1500 miles. The exhibition launched in June 2022 under the name, *The Bicycle Boys: An unforgettable garden tour*. To view visit [rhs.org.uk/eventsearch](https://rhs.org.uk/eventsearch)

[Find gardening and flower shows | UK Garden events and days out UK / RHS Gardening](#)

Following the receipt of Mary Caroe's generous legacy to the Trust, Council agreed that a long overdue book about Gertrude Jekyll's commissions in Surrey would be an appropriate memorial to Mary, who had a particular interest in Miss Jekyll. Preliminary work has begun on this project with a view to finding a way of presenting it as much more than a gazetteer.

Looking ahead, our focus will be on attracting new researchers to record our Surrey parks and gardens. We are really looking forward to welcoming new volunteers and introducing them to the fascinating world of garden research.

### **Planning Consultations affecting Surrey's historic parks and gardens (and assisting the work of the Gardens Trust as statutory consultee for the historic designed landscape)**

The Trust is contacted in many ways with requests for information and advice about historic sites. These are responded to by members of the Research and Recording Group. Planning applications are monitored for sites on Historic England's *Register* and for others noted as of Local Interest. Notifications of planning applications are received via the Gardens Trust and direct from local planning authorities.

There were 35 planning proposals considered during the year of which 30 were planning applications and 5 related to Local Plan processes. This was a lower level of consultations than in recent years. Most applications were of very little, if any, impact on Registered parks and gardens and in liaison with the Gardens Trust a "No comment" was submitted by them.

The major project for the M25/A3 Junction 10 was finally approved by the Secretary of State for Transport in May after an extended timescale to allow for consideration of further evidence requested on environmental issues. Painshill Park Trust and RHS (Wisley) have accepted the decision reluctantly after nearly five years since the first local consultation. Surrey Gardens Trust and the Gardens Trust have been thanked by the Painshill Park Trust for their advice and support, especially in relation to the unsuccessful attempt to retain an emergency access at the west end of the Park.

The monitoring of Local Plan preparations continues to show the benefit of early engagement to see whether sites of interest may be affected. This is especially important in the identification of land for residential development for which local councils remain under increasing pressure. Their undertaking of environmental assessments of sites to better determine the constraints on potential housing numbers is an opportunity to raise parks and gardens interests. The inclusion of the Trust's research in the Surrey Historic Environment Record (HER) continues to pay back in this respect.

The National Planning Policy Framework (NPPF) includes a section on “Conserving and enhancing the historic environment” that gives broad policy guidance. Local Plans and Development Management Policies are required to be compliant with this guidance. While the local planning authorities seek to do this there is a tendency to paraphrase or rewrite the national paragraphs. This has produced errors in relation to designated and non-designated (local interest) sites and the relative weights to be given to them in planning considerations. Representations have been made on behalf of the Trust but while changes have been made to submitted texts, there is still a requirement for the appointed Inspector to determine consistency with the NPPF. Decisions are awaited with interest.

### **Communications**

In April 2022, we were delighted to launch @surreygardenstrust Instagram account. Our posts have highlighted the Trust’s work, garden visits and what is going on in Surrey’s historic parks and gardens. Developing our social media presence is a key element of our communications strategy. The materials presented through Instagram posts are also repeated on our Facebook page keeping this fresh and up to date and are featured on the Home page of our website. We are hugely grateful to our communications group volunteers for their tenacity and publishing prowess in leading the way on this initiative.

Also in April 2022, our enewsletter was published in a new format as a blog post on our website. Work on the website has also achieved our goal of making this more interactive as a communications tool. Direct links on the Home page to *Latest News* and the *Newsletter* help us to share our news more effectively. We are conscious that a digital enewsletter restricts content to the extent that length of articles and the overall publication are preferably limited. However, digital delivery does enable a more flexible approach to this medium. For example, an additional enewsletter in June expanded the story of the *Bicycle Boys*. As discussed elsewhere in this Report, we will be working on additional hard copy publications with more in-depth research and content.

Zoom communication has become a way of life. This facilitates full attendance at our Trustee meetings (when Trustees might otherwise not be able to join the discussion) and our committee meetings. It has become evident that Zoom Webinars are also a preferred medium for lectures. We are following these trends where they are efficient and effective but are also working hard to ensure that we have opportunities to communicate with members in person whenever possible as this remains an essential part of our work.

## **The Future**

Delivering Schools Awards to 40 primary and junior schools across Surrey not only helps the schools and children but also raises the profile of the Trust. We enjoy our engagement with these schools, and many are in conversation with us as to how we might be able to help them further. A priority in the coming months and looking ahead into 2023 is to increase the capacity of the Schools Committee with a view to expanding our work with the school communities.

We are also enormously proud of our work under the Gateway project and are delighted that this goes from strength to strength. Our outreach work is hugely important to the Trust. Increasingly, historic parks and gardens are developing their space under a renewed understanding of the value of green spaces to our wellbeing. This year Gateway arranged a visit to West Horsley Place and we are delighted to be working with the West Horsley Place Foundation on a project to create a Sensory Garden.

In this context, we will continue to promote our Small Grants Scheme, which provides the Trust with the mechanism to support projects for the conservation and restoration of gardens and open spaces in Surrey. In a small way we can facilitate important work which will both safeguard our historic landscape heritage and encourage new garden spaces with all the benefits they bring for health and wellbeing.

We will continue to build our social media presence to improve our communication with members and to wider audiences. As we strive to grow our membership, we will prioritise communication with new members as well as old to ensure we are meeting their expectations and to encourage them to get involved. We will be working to introduce a new membership database with better capability to facilitate these aspirations.

Our programme of events and projects to expand our Research and Recording group will gain pace in the coming months of 2022 and into 2023. This is a key objective helping us to reinforce our underlying aims as a Trust. New volunteers will get involved in the work ongoing for the Local List Heritage project and as we develop the digital database and archives, we will consolidate our strong foundation of knowledge management and sharing. Lectures are a key part of our education and events programme. We will manage delivery between online and in person as appropriate and similarly will look to present our popular and hugely respected study day programme when the opportunity arises.

Once again, we value greatly our members' continuing support and their time and commitment to the Trust. Thank you.

### **Trustees' responsibility in relation to the financial statements**

Company and Charity laws require the trustees to prepare financial statements that give a true and fair view of the state of affairs of the charity at the end of the financial year and its financial activities for that period. In doing so the trustees are required to;

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

The trustees are responsible for keeping proper accounting records which 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 and the Charities Act 2011. The trustees 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.

In preparing this report, the trustees have taken advantage of special provisions of Part 15 of the Companies Act 2006 relating to small companies.

### **Appointment of Independent Examiner**

A resolution to re-appoint as Independent Examiner: Chris MacAskill of Braywood Ltd, Chartered Certified Accountants, 35 Station Approach, West Byfleet, will be proposed at the Annual General Meeting.

### **By Order of the trustees:**

Chair.....

S F Dickinson

Dated: 31 October 2022

## **REPORT OF THE INDEPENDENT EXAMINER TO THE TRUSTEES**

I report on the accounts of the Trust for the year ended 30 September 2022 which are set out on pages 15 to 21.

### **Respective responsibilities of trustees and examiner**

The charity's trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year (under section 144(2) of the Charities Act 2011 ('the Charities Act') and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- examine the accounts (under section 145 of the Charities Act)
- to follow the procedures laid down under the General Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act)
- to state whether particular matters have come to my attention

### **Basis of the independent examiner's report**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the next statement.

### **Independent examiner's statement**

In the course of my examination, no matter has come to my attention:

- 1) which gives me reasonable cause to believe that in, any material respect, the trustees have not met the requirements
  - to keep accounting records in accordance with section 130 of the Charities Act; and
  - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act.
- 2) to which in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Chris MacAskill  
for and on behalf of  
Braywood Ltd  
Chartered Certified Accountants  
35 Station Approach  
West Byfleet  
Surrey KT14 6NF

Dated: 1 November 2022

## Statement of Financial Activities

|   |       | Year to 30 September 2022 |                       |                  | Year to 30 September 2021 |                       |                  |
|---|-------|---------------------------|-----------------------|------------------|---------------------------|-----------------------|------------------|
|   | Notes | Unrestricted Funds<br>£   | Restricted Funds<br>£ | Total Funds<br>£ | Unrestricted Funds<br>£   | Restricted Funds<br>£ | Total Funds<br>£ |
| <b>Income from</b>                              |       |                           |                       |                  |                           |                       |                  |
| Legacy and donations                            | 5     | 16,604                    | 1,500                 | 18,104           | 80                        | 1,500                 | 1,580            |
| Charitable activities                           | 6/7   | 14,093                    | -                     | 14,093           | 11,256                    | -                     | 11,256           |
| Investments : bank interest                     |       | 26                        | 4                     | 30               | 13                        | 3                     | 16               |
| <b>Total income</b>                             |       | <b>30,723</b>             | <b>1,504</b>          | <b>32,227</b>    | <b>11,349</b>             | <b>1,503</b>          | <b>12,852</b>    |
| <b>Expenditure on</b>                           |       |                           |                       |                  |                           |                       |                  |
| Charitable activities:                          |       |                           |                       |                  |                           |                       |                  |
| - Members' events                               |       | 6,505                     | -                     | 6,505            | 5,034                     | -                     | 5,034            |
| - Membership services                           |       | 230                       | -                     | 230              | 660                       | -                     | 660              |
| - Awards and Grants                             | 8     | 4,899                     | 1,500                 | 6,399            | 3,772                     | 1,500                 | 5,272            |
| - Publications                                  | 9     | 80                        | -                     | 80               | 82                        | -                     | 82               |
| - Other   | 10    | 448                       | 275                   | 723              | 2,243                     | -                     | 2,243            |
| - Advertising & Publicity                       |       | 150                       | -                     | 150              | 150                       | -                     | 150              |
| - Governance                                    | 11    | 1,638                     | -                     | 1,638            | 1,309                     | -                     | 1,309            |
| <b>Total expenditure</b>                        |       | <b>13,950</b>             | <b>1,775</b>          | <b>15,725</b>    | <b>13,250</b>             | <b>1,500</b>          | <b>14,750</b>    |
| <b>Net income (expenditure)</b>                 |       | <b>16,773</b>             | <b>(271)</b>          | <b>16,502</b>    | <b>(1,901)</b>            | <b>3</b>              | <b>(1,898)</b>   |
| <b>Transfer to Restricted Fund</b>              |       | <b>(2,000)</b>            | <b>2,000</b>          | <b>-</b>         | <b>-</b>                  | <b>-</b>              | <b>-</b>         |
| <b>Net Income (expenditure) after Transfers</b> |       | <b>14,773</b>             | <b>1,729</b>          | <b>16,502</b>    | <b>(1,901)</b>            | <b>3</b>              | <b>(1,898)</b>   |
| <b>Reconciliation of funds</b>                  |       |                           |                       |                  |                           |                       |                  |
| Total funds brought forward                     |       | 28,079                    | 3,206                 | 31,285           | 29,980                    | 3,203                 | 33,183           |
| <b>Total funds carried forward</b>              |       | <b>42,852</b>             | <b>4,935</b>          | <b>47,787</b>    | <b>28,079</b>             | <b>3,206</b>          | <b>31,285</b>    |

**Balance Sheet as at 30 September 2022**

|                                       | Notes | 2022<br>£     | 2021<br>£     |
|---------------------------------------|-------|---------------|---------------|
| <b>Fixed Assets at net book value</b> |       | -             | -             |
|                                       |       | -             | -             |
| <b>Current Assets</b>                 |       |               |               |
| Stock : books for resale              |       | 1,590         | 1,657         |
| Prepayment                            |       | 302           | 30            |
| Current account – Barclays            |       | 1,249         | 2,670         |
| Current account – HSBC                |       | 31,077        | 14,592        |
| Current account – HSBC Jekyll         |       | -             | 1,019         |
| Scottish Widows account               |       | 17,174        | 16,544        |
|                                       |       | <u>51,392</u> | <u>36,512</u> |
| <b>Less Liabilities</b>               |       |               |               |
| Creditors falling due within one year |       | 900           | 1,129         |
| Prepaid subscriptions                 |       | 2,245         | 2,405         |
| Event receipts in advance             |       | 12            | 1,225         |
| Deferred grant:                       |       | 448           | 468           |
| Evelyn Conference Proceedings         |       | <u>3,605</u>  | <u>5,227</u>  |
| <b>Net assets</b>                     |       | <u>47,787</u> | <u>31,285</u> |
| <b>The funds of the charity</b>       |       |               |               |
| Restricted income funds               | 12    | 4,935         | 3,206         |
| Unrestricted income funds:            |       |               |               |
| General                               | 13    | 28,202        | 27,060        |
| Designated                            | 13    | 14,650        | 1,019         |
| <b>Total charity funds</b>            |       | <u>47,787</u> | <u>31,285</u> |

For the year ended 30 September 2022 the company was entitled to exemption under section 477 of the Companies Act 2006. No members have required the company to obtain an audit of the accounts for the year in question in accordance with section 476. The trustees acknowledge their responsibility for:

- i) ensuring the company keeps accounting records which comply with Sections 386 and 387 of the Companies Act 2006;
- ii) preparing accounts which give a true and fair view of the state of affairs of the company as at the end of its financial year, and of its income and expenditure for the financial year in accordance with section 394 and 395, and which otherwise comply with the requirements of the Companies Act 2006 relating to accounts, so far as applicable to the company.

These Financial Statements were approved by the trustees on 31 October 2022 and signed on their behalf by:

\_\_\_\_\_  
S F Dickinson, Chair

\_\_\_\_\_  
D W Hanson, Treasurer



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

**1. STATUTORY INFORMATION**

Surrey Gardens Trust Limited is a charitable company, limited by guarantee, registered in England & Wales. The company's registered number and registered office address can be found on the Company Information page. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity.

**2. Accounting policies**

**Basis of preparation**

The financial statements have been prepared in accordance with 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 2015) – (Charities SORP (FRS 102) and the Companies Act 2006

Surrey Gardens Trust Limited meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant policy note.

The principal accounting policies adopted in the preparation of the financial statements are set out below.

**Income**

Income represents subscriptions, donations and the surplus on activities. Subscriptions paid in advance are deferred to the relevant year. Income received in advance of an event is also deferred until the event date. Donations and any surplus on activities is credited in the period in which it is received.

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity; this is normally upon notification of the interest paid or payable by the bank.

During 2002 a restricted fund was established as a grant was received for a specific project. A second restricted fund was established in 2019 with the proceeds of a donation. Restricted funds are used for specific purposes as laid down by the grantor or donor. Expenditure which meets those criteria are identified to the funds.

In the year to 30 September 2007 grants totalling £3,000 were received as contributions to the cost of publishing the proceedings of the Evelyn Conference held in the previous year. This grant is being written off as the books are sold. There was one sale in the year to 30 September 2022.

**Expenditure**

Expenditure is charged in the period to which it relates. Payments made in advance of events are deferred until the date of the event.

**Stock**

Stocks of books for sale are valued at the lower of cost and estimated net realizable value.

### 3. Accumulated reserves

The net income for the period to 30 September 2022 has been added from the reserves brought forward making an accumulated reserve of unrestricted funds of £42,852 (2021 - £28,079), and restricted funds of £4,935 (2021 - £3,206).

### 4. Trustees' remuneration

No trustee received any remuneration or other benefit in respect of their services as trustees of Surrey Gardens Trust (2021 - £nil).

Amounts totalling £576 (2020 - £582) were reimbursed to six trustees (2021 – four trustees) for expenses relating to postage, travel, printing, refreshments and members' events, paid by them on behalf of the Charity.

### 5. Income from Grants and Donations

|                         | Unrestricted<br>2022<br>£ | Restricted<br>2022<br>£ | Total<br>2022<br>£ | Total<br>2021<br>£ |
|-------------------------|---------------------------|-------------------------|--------------------|--------------------|
| Legacy                  | 14,000                    | -                       | 14,000             | -                  |
| In Memoriam             | 1,631                     | -                       | 1,631              | -                  |
| Grant re Evelyn Project | 20                        | -                       | 20                 | 24                 |
| Donations from members  | 953                       | 1,500                   | 2,453              | 1,556              |
| Total                   | 16,604                    | 1,500                   | 18,104             | 1,580              |

### 6. Income from charitable activities

|                          | Unrestricted<br>2022<br>£ | Restricted<br>2022<br>£ | Total<br>2022<br>£ | Total<br>2021<br>£ |
|--------------------------|---------------------------|-------------------------|--------------------|--------------------|
| Membership Subscriptions | 3,528                     | -                       | 3,528              | 3,585              |
| Gift Aid                 | 694                       | -                       | 694                | 683                |
| Members' Events          | 8,762                     | -                       | 8,762              | 6,874              |
| Fundraising              | 1,020                     | -                       | 1,020              | -                  |
| Book Sales               | 89                        | -                       | 89                 | 114                |
| Total                    | 14,093                    | -                       | 14,093             | 11,256             |

### 7. Income from charitable activities: Book sales

|                                       | 2022<br>£ | 2021<br>£ |
|---------------------------------------|-----------|-----------|
| General book sales                    | 25        | 8         |
| Repton Red Book for Betchworth        | 25        | -         |
| Broome Park project                   | 21        | 10        |
| Gilpin project                        | -         | 20        |
| Evelyn Conference Proceedings project | 18        | 76        |
| Total                                 | 89        | 114       |

**8. Expenditure on charitable activities: Awards and Grants**

|                                 | 2022  | 2021  |
|---------------------------------|-------|-------|
|                                 | £     | £     |
| Schools Awards                  | 6,225 | 4,522 |
| Busbridge Yew Tree Café         | 174   | -     |
| Woodcote Millennium Green Trust | -     | 750   |
| Total                           | 6,399 | 5,272 |

£1,500 (2021 £1,500) of the Schools Awards was funded by three (2021 three) Restricted Donations each of £500 received from members of the Trust.

**9. Expenditure on charitable activities: Publications**

|                                       | 2022 | 2021 |
|---------------------------------------|------|------|
|                                       | £    | £    |
| General books                         | 15   | 6    |
| Broome Park project                   | 10   | 6    |
| Repton (Betchworth) project           | 3    | -    |
| Evelyn Conference Proceedings project | 52   | 70   |
| Total                                 | 80   | 82   |

**10. Expenditure on charitable activities: Other**

|                                      | 2022 | 2021  |
|--------------------------------------|------|-------|
|                                      | £    | £     |
| Archive Digitisation Project         | -    | 1,848 |
| Research and Recording Group         | -    | -     |
| Affiliation Fee to The Gardens Trust | 378  | 360   |
| Gateway Project                      | 275  | -     |
| Head Gardeners; Network              | 45   | -     |
| Subscriptions                        | 25   | 35    |
| Total                                | 723  | 2,243 |

**11. Expenditure on charitable activities: Governance**

|                         | 2022  | 2021  |
|-------------------------|-------|-------|
|                         | £     | £     |
| Independent Examination | 900   | 864   |
| Council Administration  | 738   | 445   |
| Total                   | 1,638 | 1,309 |

## 12. RESTRICTED INCOME FUNDS – Current year

|                      | Balance at<br>1 October 2021<br>£ | Incoming<br>resources<br>£ | Outgoing<br>resources<br>£ | Balance at 30<br>September 2022<br>£ |
|----------------------|-----------------------------------|----------------------------|----------------------------|--------------------------------------|
| School Awards Fund   | -                                 | 1,500                      | 1,500                      | -                                    |
| Gateway Project Fund | 1,070                             | 2,002                      | 275                        | 2,797                                |
| Garden Database Fund | 2,136                             | 2                          | -                          | 2,138                                |
|                      | <u>3,206</u>                      | <u>3,504</u>               | <u>1,775</u>               | <u>4,935</u>                         |

## RESTRICTED INCOME FUNDS – Previous year

|                      | Balance at<br>1 October 2020<br>£ | Incoming<br>resources<br>£ | Outgoing<br>resources<br>£ | Balance at 30<br>September 2021<br>£ |
|----------------------|-----------------------------------|----------------------------|----------------------------|--------------------------------------|
| School Awards Fund   | -                                 | 1,500                      | (1,500)                    | -                                    |
| Gateway Project Fund | 1,069                             | 1                          | -                          | 1,070                                |
| Garden Database Fund | 2,134                             | 2                          | -                          | 2,136                                |
|                      | <u>3,203</u>                      | <u>1,503</u>               | <u>(1,500)</u>             | <u>3,206</u>                         |

## PURPOSE OF RESTRICTED FUNDS

The School Awards Fund received donations from three members of the Trust (2021 – three), which were restricted to be used in the Trust's annual awards to schools. The money was applied to awards during the year so there was no balance in the fund at year end.

The Gateway Project Fund is restricted for use in funding the programme of visits to selected gardens in Surrey by those whose lives are affected by physical and/or learning difficulties and by those who care for them.

The Garden Database Fund provides for the use of professional support if required for the inputting of records to a database, for example if there is an urgent need.

## 13. UNRESTRICTED INCOME FUNDS – Current year

|                     | Balance at<br>1 October 2021<br>£ | Incoming<br>resources<br>£ | Outgoing<br>resources<br>£ | Balance at 30<br>September 2022<br>£ |
|---------------------|-----------------------------------|----------------------------|----------------------------|--------------------------------------|
| General Fund        | 27,060                            | 15,092                     | 13,950                     | 28,202                               |
| The Mary Caroe Fund | -                                 | 15,631                     | 2,000                      | 13,631                               |
| Jekyll Fund         | 1,019                             | -                          | -                          | 1,019                                |
|                     | <u>28,079</u>                     | <u>30,723</u>              | <u>15,950</u>              | <u>42,852</u>                        |

## UNRESTRICTED INCOME FUNDS – Previous year

|              | Balance at<br>1 October 2020<br>£ | Incoming<br>resources<br>£ | Outgoing<br>resources<br>£ | Balance at 30<br>September 2021<br>£ |
|--------------|-----------------------------------|----------------------------|----------------------------|--------------------------------------|
| General Fund | 28,961                            | 11,349                     | (13,250)                   | 27,060                               |
| Jekyll Fund  | 1,019                             | -                          | -                          | 1,019                                |
|              | <u>29,980</u>                     | <u>11,349</u>              | <u>(13,250)</u>            | <u>28,079</u>                        |

## **PURPOSE OF UNRESTRICTED FUNDS**

The General Fund is an unrestricted fund used for the day to day running of the charity.

The Mary Caroe Fund, established with her generous legacy and 'In Memoriam' donations, is designated for use in her memory on projects associated with her particular interests.

The Jekyll Fund is an unrestricted fund designated by the Trustees to enable the digitisation of more of the papers of Gertrude Jekyll, building on the digitising of the Surrey sites in the Reef Point collection at University of California, Berkeley, which was completed in 2017/18.