

PLANT HERITAGE

England & Wales · Charity number 1004009

Details

Other names	THE NATIONAL COUNCIL FOR THE CONSERVATION OF PLANTS AND GARDENS, NCCPG, PLANT HERITAGE
Status	Registered
Legal form	Charitable company
Company number	02222953
Registered	1991-08-28
Register	View on the Charity Commission register

Contact

Address	First Floor Offices Stone Pine House Wisley Woking Surrey
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Website	www.plantheritage.org.uk

Activities

Objects: (I)FOR THE BENEFIT OF THE NATION AND THE PUBLIC AS A WHOLE TO ENCOURAGE THE CONSERVATION OF ENDANGERED OR RARE PLANTS OF SPECIES HYBRIDS AND CULTIVARS WHICH CAN BR GROWN IN GREAT BRITAIN AND THEIR ENVIRONMENTS WHICH HAVE CHARACTERISTICS WORTHY OF PRESERVATION IN THE INTERESTS OF PUBLIC EDUCATION AND IN PARTICULAR HORTICULTURE BOTANY AND OTHER NATURAL SCIENCES MEDICINE AND ENVIRONMENTAL STUDIES TO ENSURE THE AVAILABILITY OF SUCH PLANTS FOR ANY PURPOSE BENEFICIAL TO THE COMMUNITY AS A WHOLE. (II)TO CONDUCT CARRY OUT AND ENCOURAGE RESEARCH INTO RARE OR ENDANGERED PLANTS OR THEIR ENVIRONMENTS AND THE COLLECTION AND RECORDING OF SUCH PLANTS AND THEIR ENVIRONMENTS AND ALL INFORMATION RELATING TO THEM AND TO PUBLISH THE USEFUL RESULTS OF SUCH RESEARCH AND TO ESTABLISH ONE OR MORE SOURCES PROVIDING PLANTS FOR EXHIBITS AND FOR PROPAGATING MATERIAL. (III)TO ENCOURAGE THE EDUCATION OF THE PUBLIC IN HORTICULTURAL SKILLS PARTICULARLY IN THE FIELD OF PLANT AND GARDEN CONSERVATION AND TO ENCOURAGE THE CULTIVATION IN GARDENS OF RARE OR ENDANGERED PLANTS. (IV)TO ENCOURAGE THE INTRODUCTION INTO THE UNITED KINGDOM AND THE PROPAGATION OF RARE PLANTS NOT REPRESENTED IN THE UNITED KINGDOM.

Activities: Plant Heritage is the accreditation body for the National Plant Collection Scheme, responsible for cultivated plant conservation. It is also responsible for the Threatened Plants Project, the only research project investigating the availability of cultivated plants in the UK. Plant Heritage was formerly known as The National Council for the Conservation of Plants and Gardens (NCCPG).

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Provides Services, Sponsors Or Undertakes Research, Acts As An Umbrella Or Resource Body
- **What:** Education/training, Environment/conservation/heritage
- **Who:** The General Public/mankind

Geography

- Northern Ireland
- Scotland
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2024-10-31	£405,188	£461,922	-	-
2023-10-31	£639,115	£452,244	£851,850	6
2022-10-31	£498,189	£392,776	-	-
2021-10-31	£410,095	£341,747	-	-
2020-10-31	£400,213	£347,870	-	-

Trustees

Name	Role	Appointed
David Mathers		2024-12-04
Della Weight		2024-12-04
Dr Claire Farrer		2024-12-04
Emma Crawforth		2018-07-26
Gareth Morgan		2020-07-10
Jasmine Jahromi		2024-12-04
John Humphreys		2024-12-04
Kavita Kapoor		2022-09-14
Philip Wilson		2026-05-01
Sally Flatman		2024-12-04
Sir Roderick Newton		2024-12-04

Accounts

**REPORT OF THE PLANT HERITAGE TRUSTEES
AND UNAUDITED FINANCIAL STATEMENTS**

For the year ended 31 October 2024

Registered charity no: 1004009/SC041785

Registered company no: 2222953

Contents	Page
Patron, Presidents and Trustees of the Charity*	3
Annual General Meeting 2025*	4
Introduction to Plant Heritage	5
Chairman's Review*	6-7
Plant Heritage's Objectives*	8-9
Activities and Achievements in 2024/25**	10-27
Treasurer's Financial Review*	30-31
Fundraising Activities*	32-34
Structure, Governance and Management*	35-38
Statement of Trustees' Responsibilities	39
Report of the Independent Examiner	40
Statement of Financial Activities	41
Balance Sheet	43
Notes to the Financial Statements	45
*These sections form part of the Trustee's Annual Report	

Patron, Presidents and Trustees of the Charity

Patron	HM The King Charles III
President	Alan Titchmarsh CBE
Vice-Presidents	Christopher Brickell Jamie Compton Lady Hamilton Roy Lancaster Sir Roy Strong Elizabeth Banks David Knott Sarah Bray Michael Marriott
Trustees	Mrs C Bufton (Chairman) Mr J Marshall (Vice Chairman) Mr G Morgan (Treasurer) Ms E Crawforth Dr C Farrer Ms S Flatman Mr J Humphreys Ms J Jahromi Ms K Kapoor Mr D Mathers Sir R Newton Mrs D Weight Mrs S Nex (resigned Dec 2024) Mrs C Penny (resigned Dec 2024)
Charity Number	1004009/SC041785
Company Number	2222953
Independent Examiner	Frances Wilde FCCA DChA Warner Wilde, Chartered Certified Accountants 4 Marigold Drive, Bisley Surrey, GU24 9SF
Plant Heritage Office	First Floor Offices, Stone Pine, Wisley, Woking, Surrey, GU23 6QD

Annual General Meeting 2025

Plant Heritage is a membership organisation, led by the Board of Directors who are the charity's trustees. All members have been invited to our 2025 Annual General Meeting on 24th April to meet the trustees and ask questions on past performance and future plans. This will be a virtual event, so that our members based across the UK can attend.

Questions about anything contained in this report or the accompanying Financial Statements should be addressed to the chair of the board by email: chairman@plantheritage.org.uk. If that is not possible, questions can also be sent by mail to the Plant Heritage office address: Plant Heritage, Stone Pine, Wisley, Woking, Surrey, GU23 6QD, or telephone 01483 447540.

Plant Heritage

Those who founded Plant Heritage more than four decades ago set in motion a movement to protect the diversity of cultivated plants grown across the UK. They recognised that, without this work, we risk losing thousands of unique plant varieties that bring joy and represent an important historical and future resource. Our mission is even more vital as we face up to climate change, the loss of global biodiversity and an increasingly urban society.

With our thousands of members and through our flagship conservation schemes - the National Plant Collections® and Plant Guardians® - we are safeguarding around 95,000 plants for the future, from tiny orchids to enormous oak trees. Anyone who has an interest, passion or expertise in a plant or a group of plants, whether amateur or professional, can get involved. The National Collection holders come from all walks of life and live across the length and breadth of the British Isles. They curate and cultivate their own collection, and this becomes part of the largest living library of garden plants held outside botanical institutions in the UK.

Plant Heritage has a small team of staff, who work with hundreds of volunteers across the country. The members of our Board and committees are also volunteers. Information about the plants in our conservation schemes is stored securely in our award-winning system Persephone. The Threatened Plants Programme underpins our conservation work. It is an ongoing research initiative that identifies cultivated plants that are not widely available commercially, to help inform conservation efforts. As a charity, Plant Heritage is funded through membership subscriptions, donations from individuals (including legacies), companies, charitable trusts and sponsorship, as well as fundraising activities like our volunteer-run Seed Shop. It truly is a team effort, protecting plant diversity for our common good.



From top left clockwise: National Collection Holders David Simpson (*Tradescantia Andersoniana* Group & *Tradescantia virginiana* cultivars), Margaret Stone (*Pulmonaria* cultivars, *Symphyotrichum* (Aster) *novae-angliae*; and *Geranium sanguineum*, *macrorrhizum* & *× cantabrigiense*); and David Carver (*Hyacinthella*). Picture on right: Plant Heritage CEO Gwen Hines, standing in the National Collection of *Erica* (heathers) at RHS Wisley garden.

Chairman's Review



2024 started well with the delightful news that Catherine Penny - Collection Holder, Group Chair and one of our long serving Trustees - was awarded an MBE for outstanding services to plant conservation and the community in North Preston, Lancashire. Mid-year, we were delighted to be informed that HM The King chose Plant Heritage as a priority to continue his royal patronage. We feel his support in many ways, not least through his shared passion for plants demonstrated through the National Plant Collections held at Highgrove and Buckingham Palace. Recognition for the value of our work was also reflected in the CBE awarded in the January 2025 New Year's Honours list to our President, Alan Titchmarsh, for services to horticulture and to charity.

This was also the year when we decided we were ready to recruit a CEO, welcoming Gwen Hines to the team in March 2024, who joined us from Save the Children UK. Gwen's passion for horticulture embodies the ethos of everyone at Plant Heritage and the important conservation work we strive to achieve. She has made an exceptionally strong start and has already visited many groups and National Collections. We are looking forward to our next chapter with Gwen at the helm.

Once again, we finished the year with a record number of National Plant Collections (727), including the first ever to be held in a pub and another first in a women's prison. Their accreditation shows that anyone with a passion for plants can take an active role in plant conservation, and that National Plant Collections can be held anywhere. We can be proud that our work at Plant Heritage contributes to the objectives in the Global Biodiversity Framework. This year's winners of the prestigious Brickell Award are a great example of excellence in conservation. The prize went to Gill Mathers, David Mathers and Jim Durrant from the Mathers Foundation, in recognition of their outstanding work conserving a variety of orchid species and hybrids that otherwise might be lost. Two of their National Plant Collections were rescued when the original Collection Holder was no longer able to maintain them. This demonstrates why planning for succession is important, and how it can enable us to keep plants safe and can provide a foundation for further development.

Our brilliant National Collections Holders' conference in November (thanks to Kew Botanic Gardens for hosting us), focused on the importance of succession planning and duplicate National Collections to ensure the amazing work done by Collection Holders is carried forwards. The conference also discussed the importance of shared National Collections held by groups, which enable more people to get involved in our conservation work.

The Plant Guardian scheme continues to flourish with almost 3,000 plants now secured in the scheme. Thanks to funding from the National Heritage Lottery and the hard work of our digital volunteers and staff, it is now possible to find more information about these plants on our website. Both the National Plant Collections and Plant Guardian schemes are underpinned by the work of our Threatened Plants Programme, which identifies plants that are not readily available commercially and deserve special attention to make sure they do not disappear forever.

Plant Heritage members are at the heart of everything we do, evident by the success of the many talks, events and plant fairs organised by our groups and volunteers across the country. Our thanks

go to the Dumfries and Galloway group who organised a wonderfully informative Members' Weekend in Stranraer in May 2024, hosting the annual Plant Exchange and arranging superb garden visits. We are looking forward to the next get together at Thenford Arboretum in June 2025.

Succession planning is also a topic for our membership team, who are working hard to engage more people with our work. We are delighted that our mission is attracting the interest of a growing number of younger members and students. Their passion for conservation will help sustain and grow our National Plant Collections for the future.

Engaging with the public at plant fairs and shows is one of the best ways to encourage membership and provides people with a first-hand experience of our work. In 2024, we showcased "National Plant Collections everywhere and for everyone," at the Royal Horticultural Society (RHS) Hampton Court Palace Garden Festival. The team were delighted to be awarded an RHS Gold Medal. We also exhibited at many other events across the country, thanks to the hard work of our local groups. We will be returning to the RHS Chelsea Flower Show in 2025 with a Plant Heritage zone.

We are very grateful to all those who fund our work, whether through membership subscriptions, plant sales, events and donations, as well as grants, sponsorship and advertising. Whilst our finances remain strong, with reserves that have enabled us to invest in staff and technology this year, our income is lower than last year, demonstrating how important legacies are to boosting our funds.

For good governance, it is important that we continue to bring a diverse range of expertise to the Board, as trustees may only serve a limited time. This is why seven new trustees joined us in December 2024, along with some new committee members. We would like to welcome everyone who has joined us and record our thanks to two long serving trustees who stood down in December, Sally Nex and Catherine Penny.

In my last year as Chairman, I would like to thank all our members, supporters and volunteers for their time and enthusiasm for cultivated plants. It is through your efforts that we can continue our mission, including the time you give and the funds you help to raise. I would also like to thank those who lead our Local Groups and our Local Representatives who keep the work of the charity alive across the country. I'd also like to say how proud I am to have worked with such an exceptional staff team whose passion for plants shines through in all they do. On behalf of the Board of Trustees, I thank you all.



Cecilia Bufton
Chairman

April 2025

Trustees Report – Objectives and Achievements

The Board, who are the Trustees of Plant Heritage (“the Charity”), present their annual report for the year ended 31 October 2024, prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity’s governing document, the small companies regime s419(2) Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) and “Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)”

Plant Heritage’s charitable purpose:

Plant Heritage’s charitable purpose as set out in our [Articles of Association](#) and Memorandum of Understanding is to:

- Promote the conservation of cultivated plants with a focus on endangered or rare garden plants
- Encourage and carry out research into cultivation of rare or endangered plants and related information
- Encourage the education of the public in horticultural skills, particularly with regards to cultivated plant conservation
- Encourage the introduction and the propagation of rare, cultivated plants not represented in the UK, within the law

We aim to do this by:

- Conserving our horticultural heritage by keeping living examples of plants in the **National Plant Collections**® scheme which enables us to coordinate collections, ranging from cultivated and species, to historical, heritage and scientific
- Identifying cultivars at the highest risk of extinction, with the ambition that these can be conserved. We do this through our **Threatened Plants Programme**
- Encouraging individuals to conserve individual plants in the **Plant Guardian**® scheme, a register of holders of rare and unusual plants
- Sharing rare plants with gardeners across the UK, through our annual **Plant Exchange**
- Documenting and recording collections of rare plants. This is done by our National Collection Holders and Plant Guardians and in our publications such as the *Directory*, *The Journal*, and through our online plant recording database **Persephone**
- Increasing the variety of garden plants available for gardens in the UK through supporting and undertaking group propagation activities and plant sales
- Ensuring rare plants and collections are supported in perpetuity (for future generations)
- Supporting Plant Guardians and National Collection Holders in their conservation work
- Educating the public in the importance of our work
- Working in partnership with organisations that can support our objectives
- Raising **funds** to support this work

Our Conservation Strategy

Our conservation work is carried out in line with a five-year strategy (2022-27) that helps us to keep to the highest conservation standards and is delivered by working with National Plant Collection® holders, Plant Guardians, our volunteers, members, partners and supporters.

Our conservation strategy has four objectives:

1. To increase the number of cultivated plants conserved across the UK and Ireland
2. To develop and maintain good standards of curation
3. To inform and engage others with our conservation work
4. To influence global thinking on issues around plant conservation

Why our work matters more than ever

The UK's cultivated flora is incredibly rich, resulting from our history as well as development and care over centuries by dedicated gardeners and breeders. Nobody knows exactly how many different garden plants there are in the UK. The Royal Horticultural Society (RHS) has estimated that there could be as many as 400,000. Plants are a valuable historical and future resource, whether for their beauty, or having edible, medicinal or other useful properties. Each plant has a unique genetic code making it impossible to replace if lost. Protecting a diverse range of plants is good for biodiversity and increases our resilience to shocks, like extreme weather and pests and diseases.

Box 1: Increasing Threats to Garden Plant Diversity

Changing fashions

Changes in styles of planting and taste mean groups of plants go in and out of fashion, but if they are not being grown, they disappear forever. We want to protect a wide variety of plants, so we can enjoy them today and tomorrow.

Pests and diseases

The nature of modern trade and travel has increased the risk of new pests and diseases being imported into the UK. Recent examples include box blight, ash dieback, and agapanthus gall midge. Climate change is making this worse. There is a growing interest in finding plants that are less susceptible, including research involving heritage varieties.

Climate Change

Historically, the UK's mild climate has enabled us to grow a huge variety of plants, brought back from elsewhere or bred in the UK. Our changing climate is putting this at risk. Droughts, floods, storms and rapid shifts (e.g. from very hot to very cold periods) are making the work of National Collection holders harder. Yet the genetic diversity contained in these collections is important for our future resilience to climate change, and for global biodiversity.

Changes to the plant sales trade

Many garden centre chains and supermarkets stock a very limited range of plants, of a certain size and want to display them to customers when they are in flower. Specialist nurseries carry a much wider range, but it is hard for them to compete. Import/export restrictions designed to control pests and diseases, and post Brexit have made it even harder. We need to celebrate and protect the plants we have and support specialist nurseries.

Loss of key skills

A lack of horticultural skills, particularly in plant propagation and cultivation, is causing a reduction in the availability of specialist plants. Through our workshops and talks and working with partners we want to reverse this trend.

Plants growing in gardens might seem safer than those in the wild, but they can easily be lost forever if nobody is looking after them. Plant Heritage is the only organisation with the aim of conserving garden plants across the UK and Ireland. Today, our work is more important than ever, because of the increasing threats we face (see Box 1). We believe that cultivated plants deserve to be conserved. Each one contains a unique combination of genetic material and is testament to human effort and inventiveness.

Progress towards Objectives in 2023/24

Objective 1: Increasing the number of cultivated plants conserved by Plant Heritage across the UK and Ireland

National Plant Collections®

A National Plant Collection is a registered and documented collection of a group of plants. Collection holders are individuals or organisations who undertake to conserve these plants by growing them and recording information about them. Many share plant material with others, and some do research into their plants. Each National Collection has a defined botanical scope either taxonomically, such as all the *Penstemon* cultivars, or by their shared history such as plants collected by Harold Comber. They might otherwise have a geographic link, such as Northwest English apple cultivars.

National Plant Collections are made available for people to view, either by appointment, on special open days or as part of a garden open to the public. Together, they represent a huge resource for gardeners, nursery owners, garden designers, plant breeders and those interested in historical gardens and landscapes. Having these plants part of a registered conservation scheme ensures that they will be a resource for generations to come.

The National Plant Collections scheme is overseen by the Plant Collections Committee, a sub-committee of the Board, whose members are independent advisers, experts in taxonomy, horticulture, botany and the horticultural trade and area group volunteers. The committee rigorously assesses new applications for scope and coverage and also considers guidance for Collection Holders on cross-cutting issues such as plant health.

Today there are National Plant Collections everywhere from windowsills to back gardens, greenhouses, parks, allotments, public gardens, plant nurseries and zoological gardens. In 2024, we were delighted to welcome the first National Plant Collections in a pub and in a prison (see Box 2). Their accreditation shows that anyone with a passion for plants can take an active role in plant conservation.

There are still some important groups of garden plants that are not represented in National Collections. Through our annual Missing Collections campaign, we encourage more people to consider becoming a National Collection Holder (see below).

Box 2: The first National Plant Collections in a pub and a prison

The White Hart in Bitton, between Bristol and Bath, has a National Plant Collection of *Crocasmia* with nearly 200 varieties, from rare cultivars such as 'Zeal Remembrance' to more common forms found in many gardens. Cared for by the pub's owners Jemma Wiggins and her husband James Smith, the main Collection is held in the beer garden, in pots and in borders. It is supported by a private courtyard holding more cultivars, and come summer, the beer garden is teeming with yellows, reds, oranges for customers to admire.

HMP Eastwood Park is a prison and young offender institution for women. Their National Plant Collection of *Tulbaghia* is cared for by Gary Stone, HMP Eastwood Park's Horticultural Craftsman, and two female prisoners. The different species are dotted around the prison garden in pots. The prisoners have learnt how to look after the collection, including repotting, labelling and helping with the paperwork, which develops many different skills. The star-shaped flowers bloom in late summer and into early autumn, and bring a pretty range of whites, pinks and delicate purples into the garden.



Tulbaghia 'Hoyland Giant Beauty'



Crocasmia 'Bressingham Dark Fires', photo credit Jemma Wiggins

In 2024, we reached a new record of 727 accredited National Plant Collections (715 in 2023), including 40 new collections. Of these, 362 are categorised as horticultural collections, 277 as reference collections and 88 as historical collections. Sometimes people come forward with a collection that is already well developed and sometimes it takes longer. Of the 54 new proposed National Collections in 2024 (45 in 2023), 15 came forward for full accreditation within the year. There are over 100 proposed National Collections outstanding, many of which will become fully accredited in future.

In total, 17 National Plant Collections were withdrawn this year, for a mixture of reasons. Sometimes plants suffer badly from pests and diseases and cannot be saved. Sometimes Collection Holders need or want to step back from this work, which is done on a voluntary basis. In several cases this year, the rare or unusual plants from a withdrawn National Collection were transferred to the Plant Guardian scheme, which helps to keep them safe. We ask all National Collection Holders to develop a succession plan, and we are encouraging more duplicate Collections which help to spread the risk. Garden Organic's new National Plant Collection of species *Calendula* is a good example of continuity: it was previously at Bristol Zoo (a zoological garden, which closed in 2022) and we are very grateful to the garden team there for their dedicated work to record and preserve the seed of the collection until a new home could be found.

The new National Collections of *Agave*, *Hamamelis* and *Amelanchier* accredited in 2024 are duplicating older collections, which is important to help ensure their long-term future. It is also encouraging to see more shared (dispersed) Collections come forward: these are held by groups, which is a great way for more people to get involved in plant conservation.

National Collection Holders' Conference 2024

The 2024 Conference held in November focused on how we can ensure the continuity of National Plant Collections in this era of environmental change. It was well attended, with 130 participants including two Plant Heritage Vice Presidents: Sarah Bray and Michael Marriott. Kew Royal Botanic Gardens (which has 10 National Collections across the Kew and Wakehurst site) kindly hosted the event. We had keynote presentations from Simon Toomer, Kew Curator of Living Collections, Lucy Hart, Head Gardener at Fulham Palace House and Garden and James Armitage, Editor of the RHS Plant Review. We also had short talks from several National Collection holders: Catrina Fenton from Garden Organic on 'Calendula: a diverse and exciting venture for seed conservation'; Chris Bird and Liz Smith of Sparsholt College on 'DNA the Apple Way'; and Bethan Collerton from Birmingham Botanical Gardens, 'Caring for Cyclamen in a Changing Climate'. We finished with an engaging panel discussion.



Participants at the National Collection Holders' Conference 2024, held at Kew Royal Botanic Gardens

Threatened Plants Programme

Through our Threatened Plants Programme (TPP), Plant Heritage conservation staff track the history, availability and locations of cultivated garden plants to work out how rare or threatened they are. This information can be used to help prioritise plant conservation work. Threatened plants may be Critical in cultivation (not found alive), Endangered in cultivation (grown in only one or two locations), or Vulnerable in cultivation (three or more sites).

Assessments are reported as data or in written reports, internally and for partners such as National Collection Holders, the RHS and specialist societies, to promote and support active conservation of threatened and near-threatened garden cultivars. Plant Guardians can also see if a plant has been assessed as threatened by looking at the digital plant records in our Persephone system.

The Threatened Plants Programme holds information, for the UK and Ireland specifically, on nearly 133,000 different named cultivars in 1,624 genera. Of these, over 7,000 are additional to the RHS 'Find a Plant' online database, which is the most widely used public source of cultivated plant information in the UK.

We hold important and fascinating information about these plants, including trade names, synonyms, Plant Breeders' Rights (PBR), awards, first and last dates listed in the RHS Plant Finder (1987-2024), first and last dates grown (1562-2024), whether they have been part of a National Plant Collection (past, present and proposed) or the Plant Guardian scheme, or recorded in our annual Plant Exchanges, Threatened Plant of the Year competition, or registered at botanic and historic gardens. We also hold information from International Cultivar Registration Authorities, referees, archived files and online sources. Conservation status is calculated by Plant Heritage within the programme. Of the nearly 133,000 plants assessed under the Threatened Plants Programme by the end of this year, 75,050 plants were assessed as threatened, which shows how many of our amazing garden plants are not readily available commercially and could be at risk of disappearing. The National Plant Collections are an important way to protect these plants: in our sample analysis of 23,230 different cultivars held in 326 National Collections, 7,967 meet the threshold for being categorised as 'threatened'.

Plant Guardians®

Plant Heritage encourages our members to take an active part in conservation work by becoming a Plant Guardian. They can look after one or more rare or unusual plants, without looking after a whole National Plant Collection. Sometimes people already have a special plant, and we can check if it is rare or unusual. In other cases, people take on a plant that's eligible for the Plant Guardian scheme through our annual Plant Exchange for members.

Plant Heritage keeps a digital record of plants in the scheme (in Persephone). We encourage Plant Guardians to propagate the plants they are caring for and to share them with other members via the Plant Exchange, local Plant Heritage propagation groups or via plant sales. Through the scheme, rare plants are grown in multiple locations as an insurance against loss.

The scheme has gone from strength to strength since it was first launched in 2013. There are currently 2,674 Plant Guardian plants recorded (2,293 in 2023). Of these, 696 cultivars are assessed as 'threatened in cultivation' by our Threatened Plants Programme and 817 are species plants that are rare & hard to locate.

During the year, we published four rare plant blogs, to showcase the scheme and to tell the stories of the plants and the people behind them. These stories are also pushed out via our social media.

We have continued to expand the online catalogue of plants held in the Plant Guardian scheme on our website, developed with funding from the National Heritage Lottery Fund in 2022-



Plant Guardian plants looked after by member Claire Davitt

23 and with the support of our digital volunteers. This catalogue, which is powered by our plant recording system Persephone, has a short description and an image of each plant, plus an assessment of whether the plant is 'threatened in cultivation'. Putting this information together takes time given that these plants are not widely available commercially. Over 500 Plant Guardian plants had been published in the virtual catalogue by November 2024 and our aim is to expand this to cover all plants in the scheme, so they can become better known and enjoyed.

Plant Exchange

The best way to conserve rare plants is to propagate and share them. Through our annual Plant Exchange, Plant Heritage members propagate and share hard to find plants with other members. By distributing plants around the country, we can re-establish plants in danger of being lost and give members the chance to get hold of something special. We encourage members who receive plants from the Plant Exchange to propagate them and pass them on again, to help secure their future. We also encourage registration of these plants in our Plant Guardian scheme so we can keep track of them. The Plant Exchange for 2024 was held in Stranraer, Scotland, at the Members' weekend hosted by the Plant Heritage Dumfries & Galloway Group. 15 groups took part, with around 500 plants being swapped. These plants are recorded in our digital system Persephone. In 2025, the Plant Exchange will be held as part of the annual Plant Heritage members' day at Thenford Gardens and Arboretum near Banbury, Oxfordshire.



Members swapping plants at the 2024 Plant Exchange in Stranraer, Scotland

Objective 2: Developing and maintaining good standards of curation for all plants held in our conservation schemes.

National Plant Collection Coordinators

Collection Coordinators play a vital role in our conservation work: mentoring and advising people who are interested in starting a National Plant Collection, supporting new applicants, visiting existing collections, and acting as the local point of contact for queries. They also act as the link between Collection Holders in their area, the local group and the central conservation team. They are all volunteers, who generously donate their time and skills. In 2024, we were delighted to welcome new coordinators in Southwest Devon and Cornwall. We still have gaps in Herefordshire, East Midlands (covering Northamptonshire & Nottinghamshire), North Staffordshire, Hertfordshire & Bedfordshire, and the West Midlands.

Collection Coordinators are in touch regularly with each other and with the conservation team to report on progress. Collection Coordinators from the south and west of the UK were kindly hosted by the Newt in Somerset, who have two National Collections of apples and crabapples. Coordinators from the Northern region (including Scotland, Ireland and North England) held their annual meeting online. In 2025, we plan to hold a national symposium for all Collection Coordinators to discuss challenges and opportunities for the future and provide some training.

Financial Support to National Collection Holders

The Collection Holder Bursary provides funds (£100 - £500) to help to promote, support and improve the National Plant Collections. In 2024, bursaries were provided for interpretation panels and signage at Yorkshire Arboretum, Glasgow Botanic Gardens, Wiltshire College at Lackham and

Garden Organic, so visitors learn more about the National Plant Collections. Six additional bursaries were provided to cover a range of important investments, which would not have been possible without this funding, including a study visit, propagation materials and help with labelling and signs for educational events. In addition to this central fund, several Plant Heritage groups provided direct grants to support National Collection Holders in their area.

Plant Records

Plant records are an important element of maintaining good standards of curation.

National Collection Holders can choose to keep their plant records in their own system, or opt for Persephone, the award-winning online records system developed especially for Plant Heritage. The central team uses Persephone, and we continue to work towards a fully comprehensive, searchable and accessible database of all the plants in the National Collections.



Persephone now holds records for two-thirds of accredited Collections (487 National Plant Collections in November 2024) as well as 100 proposed Collections. We are adding all new National Collections, as well as plants in the Plant Guardian scheme and plants swapped

through the annual Plant Exchange. Most of the Collections recorded on Persephone are held by private Collection Holders who have added a wealth of information to the site. Where National Collections are held in institutions that use other horticultural databases, they are asked to send a regular output of key data. These records are then managed, on their behalf, by Plant Heritage.

Persephone is owned by Plant Heritage, and we have continued to develop it to meet our needs. In 2024 we invested in a new herbarium module, so users can record information about their physical specimens. The Persephone project is overseen by the Persephone Working Group and delivered by a team of volunteers and staff working together. During the year, the Persephone team responded to many user support requests via email and provided 120 one to one training sessions (online), plus 18 workshops for groups online and one face to face.

Key information about plants recorded in Persephone is shared with the Plant Heritage conservation team and National Collection Coordinators to facilitate management of the scheme. Users may also grant viewing access or various levels of edit access to plant enthusiasts around the world, enabling global exchange of information. The Persephone Team also supports best practice in plant curation by advising National Collection Holders on accessioning and labelling plants. Persephone is also used to manage the records of 'Desiderata' (hard-to-find plants that Collection Holders are seeking). Persephone users may record information about such plants on the site, and this information is visible to all Persephone Users, who may be able to help with finding them.

Persephone for Subscribers

We make Persephone available to large/open gardens to record the plants in their gardens. The scheme has attracted a growing number of subscribers, some in very well-known open gardens & arboreta around the UK. More than 25,000 accessions have been recorded by one garden alone. Use of Persephone by external organisations brings a sustainable

income to the project and extends Plant Heritage's conservation reach by helping other organisations to record their plants well, including many rare plants.

Persephone for Members

Persephone is also available to Plant Heritage members who can record up to 1,000 plants in their private gardens by taking out our 'Membership Plus' subscription. Members with particular plant interests may use Persephone to share their records with each other, so facilitating exchange of horticultural information. Most current member users have indicated that they will be willing to share their records to support plant conservation projects.

Objective 3: Informing and engaging others with our conservation work

By telling others what we do and why, and showcasing the plants in our flagship schemes, we increase public support for plant conservation and for our work.

Directory of National Plant Collections

Any member of the public can easily access information about the National Plant Collections from our website. We regularly update this. In addition, our published Directory lists all National Plant Collections. In 2024 we published a supplementary Directory, giving full details of new Collections accredited in the previous 12 months. This is issued free to members and available to purchase for a small fee if members of the public would prefer to use that instead of our website.

Green Plaque Scheme

National Plant Collections are accessible to visitors whether by appointment, through specific open days, or business open days. We are grateful to all our Collection Holders for their continued commitment to make this possible. We encourage our members and the public to visit the Collections to see for themselves the conservation efforts being made and to enjoy the wide range of plants being conserved. Details of open days are updated regularly on our website.



National Plant Collection Holders from Norfolk with their green plaques

A growing number of National Collection Holders now display our distinctive Plant Heritage green plaques, highlighting that a National Plant Collection is held in their garden.

The Journal

Our Plant Heritage Journal highlights the conservation work of National Collection Holders and Plant Guardians and is widely respected for the quality of its articles. This twice-yearly publication is edited by Plant Heritage member and former journalist Clare Hogan, who also worked at the Animal and Plant Health Agency (APHA). It is provided free to all members. The aim is to educate and inform people, and to encourage them to take part in conservation by becoming a Plant Guardian or a National Collection Holder, or to get involved with our Plant Exchange. The Spring 2024 edition focused on National Plant Collections that are at their best in midwinter and early spring. The Autumn edition highlighted National Collection Holders who create new varieties, as well as new plants to hold in a Collection. The Spring 2025 Journal is all about planning ahead to ensure the continuity of National Plant Collections. The Autumn 2025 edition will focus on Collections well-suited to cut flowers, given the growing interest in sustainable flower farming.

Missing Collections Campaign

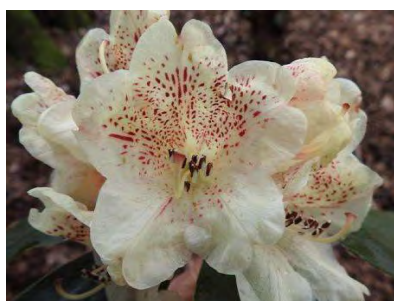
The Missing Collections campaign, first launched in 2016, encourages people with a passion for plants to bring together a National Plant Collection of their own and join the Plant Heritage community in growing, sharing and saving plants. In recent years, the Missing Collections campaign has helped us to secure new collections for *Aeonium*, *Alcea*, *Baptisia*, *Colocasia*, *Eryngium*, *Ginkgo*, *Thalictrum*, *Tradescantia* and *Verbena*. As part of our commitment to environmental sustainability, our 2024 campaign highlighted pollinator-friendly plant groups: *Agastache*, *Argyranthemum*, *Baptisia*, *Caryopteris*, *Clethra*, *Coreopsis*, *Gaillardia*, *Ligularia*, *Lysimachia*, *Origanum*, *Osteospermum*, *Phlomis*, *Potentilla* and *Verbascum*.

We have already received National Collection proposals for three plant groups from our campaign: *Baptisia* (already awarded), *Coreopsis* and two for *Origanum*, which is encouraging.

To publicise the campaign, we gave interviews on numerous local radio stations, contributed to articles in magazines and used our social media and website. We also highlighted the campaign in our display at the RHS Hampton Court Palace Garden Festival. We planted up a border with plants that are safely in National Collections, contrasting this with another border showing examples of stunning flowers from our Missing Collections campaign. This proved to be a good way to explain our work to the public.

Threatened Plant of the Year

Our annual Threatened Plant of the Year competition draws public attention to this important issue, by giving anyone the chance to enter an unusual, rare or special cultivated plant that is not currently available commercially and has been grown or sold in the UK or Ireland prior to 2014. It continues to attract significant media attention as well as public entries. 12 plants were shortlisted in 2024 and showcased as part of our educational display at the RHS Hampton Court Palace Garden Festival in July.



Aubrieta 'Shangarry' (top) and
Rhododendron 'Leonardslee Primrose'

The judges' 2024 winner of the Threatened Plant of the Year competition was *Aubrieta 'Shangarry'* which is a fitting tribute to the late E. Charles Nelson, who dedicated significant effort to researching and documenting its history. E. Charles Nelson, a respected botanist and author, passed away in June 2024 while on holiday in Greece, but his legacy continues through his extensive writings and the plants he introduced to a broader audience. *Aubrieta 'Shangarry'* was first listed in 1935 and probably named after Shanagarry in County Cork, Ireland.

The 2024 People's Choice award, as nominated by visitors to the show and online via our website, went to *Rhododendron 'Leonardslee Primrose'*, which was raised at Leonardslee Lakes and Gardens in Sussex by Sir Edmund Loder from a cross between *Rhododendron campylocarpum* and a white flowered form of *Rhododendron arboreum*. This is now classed as an endangered cultivar, rarely if ever found in cultivation outside of Leonardslee.

Brickell Award

The Brickell Award recognises excellence in cultivated plant conservation and has been awarded to a different National Plant Collection Holder every year since 2003. Named after Plant Heritage's founding member and current Vice-President Chris Brickell, it also celebrates the extensive and ongoing commitment, passion and research of National Plant Collection Holders.



Garden historian and writer Advolly Richmond presented the Brickell Award to Jim Durrant, Gill Mathers and David Mathers of the Mathers Foundation

The 2024 Brickell Award was given to the Mathers Foundation in West Sussex, who care for five National Plant Collections of orchids (*Masdevallia*, *Oncidium*, *Pleione*, *Stanhopea* and *Acineta* and *Anguloa* species and hybrids). The judges commended the Foundation for using the 17,000 plants within their care to support research, including tracking, identification and photographic logging of all their plants and studying improved methods of growing and propagation.

Objective 4: Influencing global thinking on issues around plant conservation and aligning Plant Heritage with global thinking on sustainability, biodiversity, conservation and plant taxonomy

Plant Heritage's work contributes to the global biodiversity target for 2030, as set out in the Kunming-Montreal 2022 agreement: *'To maintain and restore the genetic diversity within and between populations of native, wild and domesticated species to maintain their adaptive potential, including through in situ and ex situ conservation.'*



The National Plant Collections are an example of *ex situ* (off site) conservation of domesticated species (cultivated plants), although some Collections also include species. Around 33,000 of the plants held in the National Plant Collections originated in the wild and some are now critically endangered in their natural habitats due to climate change and habitat destruction. Having cultivated plants as part of a registered conservation scheme ensures that they will be a resource for generations to come

Sharing knowledge

Collections can be useful for scientific research as a source of live plants and genetic material for specific investigations. Many of our National Collection Holders have become experts in their field and many share their expertise with others, including through the RHS Expert Groups.

19 of the National Plant Collections now hold scientific status, which means that the Collection Holder can demonstrate active involvement in maintaining and enhancing the taxonomic status of their plant group, in cooperation with other collections and authorities, as well as a sound knowledge of other collections (held nationally and internationally) in their genus or group and regular communication with them. They must also be able to demonstrate how they have shared their knowledge and plant material for the good of conservation and the genus concerned, including through publication. In 2024, two Collection Holders applied to work towards scientific status. Those applying for scientific status are matched with a mentor to support them through this process.

Building on our discussions with the French National Collections scheme (the Conservatoire des Collections Végétales Spécialisées or CCVS) during 2023, we have joined over 600 others in endorsing their [Manifesto on the Protection of Living Plants](#).

We continue to participate in the UK Plant Genetic Resource (UKPGR) group which serves as the technical forum to discuss plant genetic resources issues, technical matters, the development of integrated programmes and provide policy advice for government departments. The primary concern for UKPGR is food production and we have facilitated the addition of data from apple collections to be listed in the European inventory of plant genetic resources (EURISCO), which aims to make the European plant genetic resources data available everywhere in the world.

Embedding sustainability

Recognising the growing threat from climate change, we have stepped up our focus on environmental sustainability. This was a key theme at the 2024 National Collection Holders' Conference. We also organised a range of talks and workshops for Collection Holders and other members to share best practice and consider the latest research.

Some of National Collection Holders and members have been leading the way on environmentally sustainable practices for decades. We want to learn from them. We have also shared guidance with our members about plant health, plant passports and the need to tackle the rise in plant poaching, in line with the global Convention on International Trade in Endangered Species (CITES). Through our members and network of partners, we can draw on material from organisations like DEFRA's Animal and Plant Health Agency (APHA), Botanic Gardens Conservation International (BGCI) and Kew Royal Botanic Gardens.



Members visiting Melcourt Industries

Melcourt Industries kindly hosted Plant Heritage members at their production site in Gloucestershire in February 2024 to learn about their peat free growing media and the Responsible Sourcing Scheme.

Plants play an important role in mitigating, adapting to, and building resilience to climate change. By making sure plants don't disappear and encouraging people to grow a diverse range of plants, we are making a positive contribution to environmental

sustainability, but we also want to ensure that we are minimising our waste, reducing our carbon emissions, and encouraging more of our members to adopt sustainable growing practices. We have published a statement about our commitment to embedding sustainability on our website, to go with our statement on peat in horticulture.

Workshops

During the year, we held several workshops for National Plant Collection Holders and other Plant Heritage members on topics related to plant conservation, including the following:

- Online workshop about the Plant Guardians scheme and research- provided by our conservation team
- Peat free growing – an online discussion about emerging results from the RHS Peat Free research fellowship, as well as the visit for Plant Heritage members to Melcourt Industries' production facility
- Seed Collecting Workshop - hosted by the seed team at RHS Wisley Garden

- Garden Plant Taxonomy (at the Plant Heritage Members' Weekend in Stranraer)
- Communicating through Social Media (at the Plant Heritage Members' Weekend)

These workshops are in addition to training people to record plants in Persephone.

These workshops were provided either free or at a low cost, thanks to financial support from trusts and foundations, and/or the support of our partner organisations.



Members taking part in the seed collecting workshop hosted by RHS Wisley Garden seed team

Collaborating with Colleagues

From its founding in the 1970s, Plant Heritage has worked in partnership with world leading organisations including the RHS, the National Trust, the National Trust for Scotland and the Royal Botanic Gardens at Kew and Edinburgh. These organisations are all members of Plant Heritage, many provide experts for our committees, and they host some of the larger or more complex National Collections.

The National Collections and the importance of plant records are taught to horticultural students as part of the syllabus for several courses, and students get involved in practical conservation too. We were delighted to welcome students from Logan Botanic Gardens at our Members' Weekend in Stranraer, and Kew students at the National Collection Holders' conference.

We are working with other members of the Future of Gardens Group, established by the President and CEO of the RHS in 2023 to develop action plans for joint work in four areas where collective action could make a difference to the future of horticulture and the role of national gardens:

1. The role of gardens in tackling sustainability, climate and biodiversity crisis
2. The lack of people who opt to train in horticulture and its link to the wider green skills agenda in the UK
3. Raising the national profile of the importance of UK national gardens for tourism and the economy
4. Engagement with Government

A [new report](#) by the Environmental Horticulture Group highlights the importance of horticulture for the UK economy and for tackling climate change. Plant Heritage joined others to help launch this report at the All-Party Parliamentary Group for Horticulture and Gardens' Parliamentary reception in January 2025.

Related Parties

Two affiliated groups (the Manx Plant and Garden Conservation Society in the Isle of Man and Plant Heritage Guernsey) share the same objectives as Plant Heritage and generously support our work. Plant Heritage Guernsey's National Collection of Nerines has its roots in the very early days of the Guernsey Branch of the National Council for the Conservation of Plants and Gardens (Plant Heritage's former name), when it was decided to establish a living collection of the island's national flower. Plant Heritage also has links with the Wiltshire Gardens Trust who support our work, and the Irish Garden Plants Society (IGPS). The IGPS have a National Collection, accredited in 2021, of plants with an Irish connection, either bred or discovered in Ireland, introduced by an Irish person, or linked to an Irish garden or gardener. This shared Collection is held in the gardens of around 75 their members as well as several public gardens across Ireland.

Membership

Members are a vital part of Plant Heritage. All members support our conservation work through their paid subscriptions, and many are directly involved in plant conservation as National Collection Holders, Plant Guardians or take part in our annual Plant Exchange or local plant fairs. We thank all



Threave School of Heritage Gardening, owned by the National Trust for Scotland, has a National Collection of Iris Siberian cultivars (British Award winners & historically significant)

our members for their ongoing support.

As of November 2024, our total membership was 3,120. Whilst this represents a slight reduction (3,205 in 2023), we have reduced the rate of decline to 2.7% (4.5% in 2023), in line with our objective to stabilise, then re-grow our membership. We are continuing to increase the number of younger members and students (up 58% compared to 2023). We held a series of online discussion groups during 2024 for younger members and increased the age cut off from 30 to 35 in response to their feedback. The number of new members recruited (321) increased by 27% compared to last year, whilst the number leaving stayed broadly the same. It is therefore important that we focus both on recruitment and retention. We have restarted a programme of online talks and workshops, which proved popular during the pandemic and is especially important for members living in areas where there are not active local groups. All members can attend events in any region, not just those organised by their local group. All members receive a copy of our twice-yearly Journal, the Directory of National Plant Collections and email newsletters about our conservation work and member events.

Local groups

Plant Heritage members are encouraged to participate in the activities of their local Group, of which there are 25 across the UK. The volunteer committees of the groups put in a tremendous amount of effort to organise a programme of talks (some as hybrid events), plant fairs, visits and open days for their members, which also raise funds for the charity.



Some of the many activities organised by Plant Heritage local groups

We are very grateful to the Dumfries and Galloway group who organised a fantastic Members' Weekend in May 2024 in Stranraer, Scotland. Members enjoyed our annual Plant Exchange, educational workshops, fantastic food and engaging talks by Colin Crosbie, former Head Gardener to Her Majesty Queen Elizabeth, the Queen Mother at Royal Lodge Windsor and former Curator at

PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2024

RHS Garden Wisley, as well as Richard Baines, Curator of Logan Botanic Garden. Richard Baines also led us on a tour of Logan Botanic Garden, which holds four National Plant Collections.

The 2025 Member Day and Plant Exchange will take place on 7th June at Thenford Gardens and Arboretum near Banbury, Oxfordshire which has a National Plant Collection of *Galanthus* (snowdrops) as well as many other informal collections of plants and trees.



Members' Weekend 2024, kindly hosted by the Dumfries and Galloway Group

Volunteers

Whether at local or national level, volunteers are at the heart of our work. From organising or contributing to local group activities, to propagating plants for plant fairs, coordinating local National Collections or the Plant Exchange, helping people to record plants on Persephone, and a whole range of tasks volunteers help us with in the central office. The support our volunteers so generously give and the knowledge and skills they share are sincerely appreciated.



Julia Cogan and June James with the Plant Heritage seed shop at RHS Hampton Court Palace Garden Festival

Plant Heritage's volunteer-run Seed Shop was a great success in 2024 raising nearly £9,000 from donations, and encouraging more people to grow plants from seed, or to try growing a new plant. Plant Heritage members generously donated nearly 6,000 packets of seed, sorted and labelled by our keen volunteers.

Events and Shows

RHS Hampton Court Palace Garden Festival, July

Our theme for the Plant Heritage zone 2024 was 'National Plant Collections everywhere and for everyone'. We made a point of showing that plants in National Plant Collections can be incorporated into borders with other flowers for those short on space and highlighting that there are also National Plant Collections of houseplants.

We planted two borders: one with plants safely in National Plant Collections and another showcasing pollinator friendly plants from our Missing Collections campaign. We also featured the Threatened Plant of the Year competition and the Plant Heritage Seed Shop. The display successfully highlighted our work in plant conservation to the public and attracted new members. It was also awarded a gold medal by the RHS.



Hampton Court Palace Garden Festival display, 2024

Daniel Myhill won the award for best Plant Heritage exhibit for his National Collection of *Rosa persica*. The Plant Heritage zone also included displays of *Rubus* from Barry Clarke, *Pinus* from Sir Harold Hillier Gardens and *Hosta* (small and miniature) from Hogarth Hostas. Several nurseries also showcased their National Plant Collections on their own stands, including Tynings Plants who have four National Collections of climbing plants (*Passiflora*, *Jasminium*, *Mandevilla* and *Thunbergia*) and were chosen as the RHS Master Grower.

Thank you to all the Collection Holders who took part, to everyone who helped with our display during the build and during the week, and to those who donated plants and seeds. We also thank the RHS for their support at these shows.



Photos from Hampton Court Palace Garden Festival 2024

Regional shows and local plant fairs

For the first time, we mounted a Plant Heritage display at the Royal Windsor Flower Show in June and we returned to the Malvern Autumn Show in September. We also took part in the RHS Wisley event for young people in August 2024, and the Wisley Festival of Flavours in October.



Plant Heritage President Alan Titchmarsh and HRH The Duchess of Wessex visited the Plant Heritage Windsor stand and were welcomed by Helen Moorcraft (Chair of the Buckinghamshire, Berkshire and Oxfordshire group) and Gill Groombridge (Plant Heritage Business Manager) - see photo.

This is in addition to the many specialist plant fairs and displays organised by Plant Heritage groups and National Collection Holders across the country, which help to build public understanding of our work, encourage more people to grow unusual plants and raise funds. Large plant fairs were held at several venues including Helmingham Hall (Suffolk), Longstock Nurseries (Hampshire), Abbotsbury Gardens (Dorset), RHS Bridgewater (Northwest Group), Markshall Estate (Essex Group) and RHS Rosemoor (Devon Group). We thank all the local Groups and volunteers involved in these events.



Some of the many local group plant fairs, held across the country

Show plans for 2025

We are returning to the RHS Chelsea Flower Show in May, in addition to the RHS Hampton Court Palace Garden Festival in July. In both cases, we will have a Plant Heritage zone, so that we can showcase the work of National Collection Holders alongside a central display explaining the charity's work and why it is important. The Plant Heritage Yorkshire Group will be taking part in the new RHS flower show at Wentworth Woodhouse in July.

Website and IT

Plant Heritage's website (www.plantheritage.org.uk) is a key tool for us to share information about our work. One of the most popular parts of our website is the National Plant Collections search facility. We will be refreshing the resources for National Collection Holders on our website during 2025. People also use the website to join or renew their membership and to search for information about local groups and upcoming events. Some people will always prefer to contact us by phone or email, and we will continue to offer this option. We are updating our website in early 2025 as well as a new Customer Relationship Management system. This will save considerable staff time. We purchased several laptops this year to replace old/broken ones.

Media and Public Relations

Across all media, we are making progress against our objective to raise the profile of Plant Heritage, using stories about plants and people behind the plants.

Our social media presence continues to grow, especially through Instagram (over 6,000 followers)

and Facebook (6,700 followers).

In terms of external media, in the 12 months to 31 October 2024 we generated a new record of 253 items of coverage* compared to 158 items in the previous 12 months, as follows:

- 33 broadcast interviews (same as previous year) including radio and TV programmes
- One national newspaper article (Daily Mail) (3 in 2023, none the previous 2 years)
- 25 regional newspaper articles (5 in 2023)
- 45 magazine articles or features (27 in 2023)
- 149 online articles or features (90 in 2023)

The estimated potential audience reach is 508 million. This is obviously a big number and shows how much getting into national newspapers can increase our reach. Of course, we cannot guarantee that every reader and/or listener will have seen the article or listened to the radio at the exact time Plant Heritage was on – so this is just a guide and a standard reporting measure used by many organisations. The largest growth has been online articles and features. Our Threatened Plant of the Year competition and the Missing Collections campaign continued to generate significant media interest, including interviews on local radio gardening programmes by Gill Groombridge and Gwen Hines and the RHS gardening podcast. The new National Collections in a pub and a prison also attracted lots of attention.

Treasurer's Financial Review¹

This has been another successful year for Plant Heritage. The level of reserves established in previous years has allowed us to move ahead with plans for the future. Overall income was £405,188 (£639,115 in 2023) and expenditure was £461,922 (£452,244 in 2023). The difference (£56,734) was met by drawing down on the charity's reserves, as planned.

Incoming resources

Total income from legacies and donations in 2024 was £101,039 (2023: £349,050). The previous year was unusual, due to exceptionally large legacies (£250,581) and the National Heritage Lottery Fund Grant (£42,138) which has now finished. In 2024, we achieved an increase in funds secured from trusts and foundations (£42,753), including £11,293 raised through our first public fundraising campaign with the Big Give Green Match Fund (who provided £5,000 of this as match funding). Without these funds, we would have had to scale back our conservation activities. Income from charitable and trading activities (including shows and events) held up well at £274,413 (2023: £277,222). Income from investments increased significantly to £29,736 in 2024 (£12,843 in 2023).

Resources expended

Plant Heritage spent a total of £461,922 (2023: £452,244) on Charitable Activities, Fundraising and Governance in 2023. Charitable expenditure, including on plant conservation was £454,556 (2023: £449,050). The cost of generating funds was £7,366 (£3,194 in 2023).

Intangible fixed assets

Intangible fixed assets include the cost of website development work as well as the costs of development of Persephone 2.0. The total value of intangible fixed assets at the end of the year was £65,800 (2023: £79,610). The Trustees regularly review the value of intangible fixed assets as well as other fixed assets to the business.

Reserves policy

As a small charity, Plant Heritage's income and expenditure can vary significantly year to year, due to fluctuations in legacy donations and resources raised from trusts/foundations and grants.

In previous years, it has been the policy of the charity that unrestricted free funds which have not been designated for a specific use should be maintained at a level equivalent to six months' operating costs, including salaries. In addition, a further £60,000 of reserves were designated for a specific Risk Reserve, to provide a cushion against possible future sudden changes in the charity's operating environment like that presented by the COVID-19 pandemic.

Following a review, the Trustees have decided to adjust the charity's policy on reserves, to remove the separate Risk Reserve and instead to maintain unrestricted free funds at a level equivalent to nine month's general operating costs, including salaries. This will be kept under review. The Trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to

¹ Plant Heritage's financial year runs from 1 November to 31 October. This review covers the financial year 2023/24 which ended on 31 October 2024 and is referred to as 2024 above.

ways in which additional funds may be raised. This level of reserves has been maintained throughout the year. The charity's budget for 2024/25 forecasts operating costs of £340,000, therefore our minimum target for unrestricted free funds is £255,000.

As of 31 October 2024, the charity had £582,266 in the general fund (2023: £591,783). Deducting the net book value of intangible and tangible fixed assets (£69,597), the level of free reserves in the general fund is £512,669. Whilst our actual free reserves are currently above target, these will reduce significantly over the next 2-3 years as we draw down on them to fund our strategic plans. At the same time, as the charity's work expands, the target for reserves will increase. We envisage that, within 24 months, our actual free reserves will be closer to our new target level. 2024 demonstrates the uncertainty of legacy funding, in particular. Therefore, the trustees feel that maintaining a level of reserves higher than target in the short-term provides additional financial security as the charity grows and develops.

As of 31 October 2024, there were a further £189,430 of reserves designated towards specific purposes. This includes £50,000 for planned investments in our IT infrastructure, including the new Customer Relationship Management (CRM) system, upgrades to our website, further development of our plant recording system Persephone and replacement of equipment nearing its end of life.

Going Concern

Whilst we recorded a deficit in 2024 of £56,734, this was expected as we begin a growth strategy and invest in the charity's business. Given this, we consider our operations to be sustainable in the short, medium and long-term and that there is an optimistic outlook with no material uncertainty. Whilst some of our key income streams, particularly legacy income, can be volatile, Plant Heritage has accumulated a level of reserves to be able to respond to a sudden downturn in revenue, and to recruit a CEO as part of plans to further diversify and build future revenue.

The Charity has a healthy reserves position and has met its free reserves target and has also put aside designated funds. The Charity also carefully manages its working capital position and maintains a healthy cash position.

Fundraising Activities

Donations and Sponsorships

Plant Heritage is indebted to its supporters, sponsors, and advertisers – we thank them all for their generous support and in particular:

Griffin Glasshouses
Johnsons Seeds
Melcourt Industries Ltd

Plant Heritage gratefully acknowledges grants and donations from the following charitable trusts and foundations, which help to support our core conservation work as well as the Threatened Plants Programme, National Collection Holder and membership workshops, the Plant Guardians scheme and our Persephone development work:

The Swire Charitable Trust
The Hawthorne Charitable Trust
The Goulburn Charitable Trust
Mrs AA Clutterbuck Charitable Trust
Alfred Williams Charitable Trust
RHS Bursaries Fund
William Dean Countryside and Educational Trust
Jack Patston Charitable Trust
The Simon Gibson Charitable Trust
The Big Give Green Match Fund
P F Charitable Trust
Hamamelis Trust
The Frogna Trust

Plant Heritage also acknowledges donations from National Collection Holder open days, whether individual open days or through the National Garden Scheme or Scotland's Garden Scheme, all individual donations from Members, Friends and supporters.

Income from legacies and in memoriam

We received income from legacies from Mary Rawitzer, Gerald William Goddard & Rosemary Francis this year. We are also grateful to The Harkness Rose Company for their support from the 'Rosemary Day' rose in memory of Rosemary Day, former Trustee of Plant Heritage. We wish to thank those that gave donations in memoriam too.

Corporate Members

We are grateful for the continued support of our Gold Corporate Members in 2024:

Barton Grange Garden Centre
Shanly Homes

We are also grateful for the continued support of our Bronze Corporate supporters:

Arboricultural Association
Bayntun Flowers
Brother UK
Canonteign Falls
Capital Gardens Ltd
Doddington Place Gardens
Floral Tours
Griffin Glasshouses
Johnsons Seeds
Melcourt Industries Ltd
Wacks Wicked Plants
Whatley Manor
Winterling – Botanical Labels
Woottens of Wenhaston

Transfers from Groups

We are very grateful for the generosity and creativity of our Plant Heritage groups who continue to be focused on engaging with Plant Heritage members and raising funds for our work.

The charity recognises the commitment and hard work put in by the members of the groups who fundraise throughout the year and generously pass these contributions on to support the core work of the charity. In all, groups transferred £52,985 (2023: £62,395) to Central Office to help fund the charity's national work. Groups raised a total of £111,250 during the year (2023: £116,571), with the biggest amount raised through plant fairs.

Plant Heritage is also grateful to our affiliated groups in Guernsey and the Isle of Man and the Wiltshire Gardens Trust who provide important financial support.

Structure, Governance and Management

Plant Heritage is a company limited by guarantee and is governed by its Memorandum and Articles of Association, adopted on 2 February 1988, amended in April 2004, April 2010 and July 2018.

Directors and Trustees

The Board of Trustees are responsible for the overall governance of the charity. The Trustees are also the Directors of the Limited Company. Trustees are appointed by the Board and confirmed by the membership at the Annual General Meeting (AGM). At each AGM, one-third of the directors retire from office by rotation (those who have been longest in office since their last reappointment retire first). Directors retiring by rotation can seek reappointment provided they have served less than eight years in total (consecutive or otherwise) as specified in the Articles of Association. With effect from December 2024, new Directors are appointed by the board for an initial term of three years, renewable for a second term of three years. On an exceptional basis, new trustees may serve up to eight years.

Mrs Cecilia Bufton	Chairman. Appointed 5 th October 2017, re-appointed 4 th May 2019, reappointed 28 th April 2022
Mr James Muir Marshall	Vice-Chairman. Appointed 18 th April 2018, re-appointed 2 nd May 2020, reappointed 28 th April 2022
Mr Gareth Morgan	Treasurer. Appointed 10 th July 2020, reappointed 24 th April 2024
Ms Emma Crawforth	Appointed 26 th July 2018, re-appointed 17 th April 2021, reappointed 24 th April 2024
Dr Claire Farrer	Appointed 4 th December 2024
Ms Sally Flatman	Appointed 4 th December 2024
Ms Jasmine Jahromi	Appointed 4 th December 2024
Ms Kavita Kapoor	Appointed 14 th September 2022
Mr John Humphreys	Appointed 4 th December 2024
Mr David Mathers	Appointed 4 th December 2024
Sir Roderick Newton	Appointed 4 th December 2024
Mrs Sally Nex	Appointed 26 th July 2018, re-appointed 17 th April 2021, resigned 4 th December 2024
Mrs Catherine Penny	Appointed 5 th October 2017, re-appointed 2 nd May 2020, re-appointed 28 th April 2022. Resigned 4 th December 2024
Mr Jonathan Sheppard	Appointed 13 th December 2022, resigned 4 th January 2024
Mrs Della Weight	Appointed 4 th December 2024

The Board met formally on four occasions to discuss the management of the charity. Information about trustees is published on our [website](#).

Governance changes

Plant Heritage held its 2023 and 2024 AGM virtually and plans to do so again in 2025. Members can vote either in person during the meeting, by mail (email or post) or by proxy. The charity's reserves policy has been updated (see Treasurer's Review). The remit of the Finance Committee has been expanded to include fundraising, in line with the aim to grow and diversify the charity's funding base for the future. The term for new trustees has been changed to three years, renewable

for a second term of three years. On an exceptional basis, trustees may serve up to the limit of eight years specified in the Articles of Association.

Risk Management

Plant Heritage Trustees have considered the major risks to which the charity is exposed and review these at least annually through a documented risk register. Trustees are satisfied that established procedures are sufficient to manage and mitigate those risks.

Public benefit

Plant Heritage conserves cultivated plants. Trustees have paid due regard to the Charity Commission guidance on public benefit in deciding how to pursue our objectives. Our Conservation Strategy details how we carry out our work and how we engage with the public.

Staffing

Plant Heritage has a small team of 8 professional staff, equivalent to slightly over 5 full time staff as of 31st October 2024:

Gwen Hines	Chief Executive
Gill Groombridge	Business and Events Manager
Julia Cogan	Membership Team
Claire Ader	Membership Team
Mimi Wong	Finance Officer
Liz Edwards	Conservation Adviser
Lucy Pitman	Conservation Adviser
Kalani Seymour	Threatened Plants Programme Manager

A new Plant Records Officer will start in Spring 2025, taking the staff complement to 9 (the equivalent of 6 full time staff). Information about staff roles is [published on our website](#).

The Board of Trustees wish to thank all the members of staff for their expertise, loyalty, resourcefulness, and commitment to the work of Plant Heritage.

Board Committees and Working Groups (as of 1 January 2025)

Finance & Fundraising Committee <i>Meetings four times a year</i> • Helen Moorcraft (Chair) • Cecilia Bufton • Margaret Hughes • Gareth Morgan • Della Weight • Philip Wilson	Conservation Committee <i>Meetings three times a year</i> Development of Conservation Strategy and delivery of associated programmes and activities • Jim Marshall (Chair) • Emma Crawforth (Vice Chair) • Paul Bartlett • Alison Crook • Catrina Fenton • Andrew Gaunt • Sir Roderick Newton • Simon Toomer • Tim Upson • Frances Williams • Rosie Yeomans
Membership & Supporters Committee Development of membership strategies, advice, support and guidance to groups <i>Meetings three times a year</i> • Catherine Penny (Chair) • Rosemary Buisseret • Claire Farrer • Jasmine Jahrome • John Humphreys • Penny Ross	Plant Collections Committee Accreditation of National Plant Collections <i>Meetings four times a year</i> • Tim Upson (Chair) • Jonathan Webster (Vice-Chair) • Matthew Biggs • Chris Bird • Chris Clennett • Dawn Edwards • Gary Firth • Kevin Hobbs • David Mathers • Madeleine Tinson • Chris Trimmer • Rosie Yeomans
Persephone Working Group <i>Meetings three times a year</i> • Doug Smith (Chair) • Barry Clarke • Gary Firth • Alex New • David Ross • Penny Ross	
Governance & People Committee Governance, compliance, processes, policies, and guidelines. <i>Meetings four times a year</i> • Elizabeth Smith (Chair) • Cecilia Bufton • Kristopher Harper Allison • Margaret Headen • Jim Marshall • Anthony Nichols	

Business Plan 2025

Conserving the diversity of garden plants for the future

1. Increase the number & diversity of cultivated plants conserved through the National Plant Collections and the Plant Guardian scheme
2. Support National Collection Holders to achieve high standards, to embed sustainability and to develop continuity plans so their Collections are preserved for the future, along with digital records
3. Inform & engage others about our work, including sharing data, knowledge & skills of wider benefit
4. Influence UK and global thinking on issues related to plant conservation and apply best practice in our own work, including on environmental sustainability and biodiversity

Engaging more people in our work

5. Grow & diversify the membership of Plant Heritage, including more young people
6. Support our network of local groups, complemented by online events
7. Continue to raise the profile of Plant Heritage's work in the UK and beyond, with a view to increasing membership, donations and support for our work, and harness strategic partnerships

Organisational Effectiveness

8. Develop and implement a diversified funding model to sustain our work over the medium term
9. Continue to strengthen Plant Heritage's governance & ways of working, including data and financial management, adopting best practice & harnessing digital innovations where appropriate
10. Create a working environment in which staff & volunteers feel engaged and valued

Statement of Trustees' Responsibilities

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 surplus or deficit for that period. In preparing these financial statements, the Trustees have in their opinion:

- selected suitable accounting policies and then applied them consistently;
- made judgements and estimates that are reasonable and prudent;
- ensured that the applicable accounting standards have been followed; and
- prepared the financial statements on the going concern basis.

The Trustees have been responsible for keeping proper accounting records which disclose, with reasonable accuracy at any time, the financial position of the charity and which have enabled them to ensure that the financial statements comply with the Companies Act 2006. They have also been responsible for the safeguarding of the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Statement of Disclosure of Information to Independent Examiner

So far as the Trustees are aware, there is no relevant information of which the Charity's Independent Examiner has not been informed.

Approved by the Board of Trustees on 20 March 2025 and signed on their behalf by:



Trustee and Chairman
Mrs Cecilia Bufton



Trustee and Treasurer
Mr Gareth Morgan

PLANT HERITAGE

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PLANT HERITAGE

I report to the trustees on my examination of the financial statements of Plant Heritage (the charity) for the year ended 31 October 2024.

Responsibilities and basis of report

As the trustees of the charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities and Trustee Investment (Scotland) Act 2005 (the 2005 Act), the Charities Accounts (Scotland) Regulations 2006 (as amended) and the Companies Act 2006 (the 2006 Act). You are satisfied that the financial statements of the charity are not required by charity or company law to be audited and have chosen instead to have an independent examination.

Having satisfied myself that the accounts of the charity are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the charity's accounts carried out under section 44 (1) (c) of the 2005 Act and section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed the requirements of Regulation 11 of the Charities Accounts (Scotland) Regulations 2006 (as amended) and all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

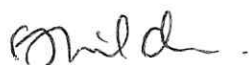
Independent examiner's statement

Since the charity is required by company law to prepare its accounts on an accruals basis and is registered as a charity in Scotland your examiner must be a member of a body listed in Regulation 11(2) of the Charities Accounts (Scotland) Regulations 2006 (as amended). I confirm that I am qualified to undertake the examination because I am a member of the Association of Chartered Certified Accountants, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act and Regulation 4 of the 2006 Accounts Regulations; or
- 2 the financial statements do not accord with those records; or
- 3 the financial statements do not comply with the accounting requirements of Regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended) and do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination; or
- 4 the financial statements have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the financial statements to be reached.



Frances Wilde FCCA DChA

Warner Wilde
Chartered Certified Accountants
4 Marigold Drive
Bisley
Surrey
GU24 9SF

Dated: .1 April 2025.....

PLANT HERITAGE

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 OCTOBER 2024

Current financial year		Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Restricted funds 2024 £	Total 2024 £	Total 2023 £
	Notes					
Income from:						
Donations and legacies	3	87,502	2,245	11,292	101,039	349,050
Charitable activities	4	150,057	105,025	-	255,082	254,241
Other trading activities	5	16,053	3,278	-	19,331	22,981
Investments	6	29,034	702	-	29,736	12,843
Total income		282,646	111,250	11,292	405,188	639,115
Expenditure on:						
<u>Raising funds</u>						
Fundraising and publicity	7	7,366	-	-	7,366	3,194
<u>Charitable activities</u>						
Memberships and shows	8	76,059	2,705	-	78,764	61,383
Educational Activities	8	85,342	62,671	1,466	149,479	154,597
Plant Conservation	8	213,914	1,916	10,483	226,313	233,070
Total charitable expenditure		375,315	67,292	11,949	454,556	449,050
Total expenditure		382,681	67,292	11,949	461,922	452,244
Net income/(expenditure)		(100,035)	43,958	(657)	(56,734)	186,871
Transfers between funds		90,518	(90,518)	-	-	-
Net movement in funds	11	(9,517)	(46,560)	(657)	(56,734)	186,871
Reconciliation of funds:						
Fund balances at 1 November 2023		591,783	235,990	24,077	851,850	664,979
Fund balances at 31 October 2024		582,266	189,430	23,420	795,116	851,850

The statement of financial activities includes all gains and losses recognised in the year. All income and expenditure derive from continuing activities.

PLANT HERITAGE

STATEMENT OF FINANCIAL ACTIVITIES (CONTINUED) INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 OCTOBER 2024

Prior financial year		Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Restricted funds 2023 £	Total 2023 £
	Notes				
Income from:					
Donations and legacies	3	301,311	1,993	45,746	349,050
Charitable activities	4	147,348	106,893	-	254,241
Other trading activities	5	15,804	7,177	-	22,981
Investments	6	12,335	508	-	12,843
Total income		476,798	116,571	45,746	639,115
Expenditure on:					
<u>Raising funds</u>					
Fundraising and publicity	7	3,194	-	-	3,194
Memberships and shows	8	40,839	14,762	5,782	61,383
Educational Activities	8	82,303	69,294	3,000	154,597
Plant Conservation	8	191,117	1,662	40,291	233,070
Total expenditure		317,453	85,718	49,073	452,244
Net income/(expenditure)		159,345	30,853	(3,327)	186,871
Transfers between funds		62,395	(62,395)	-	-
Net movement in funds	11	221,740	(31,542)	(3,327)	186,871
Reconciliation of funds:					
Fund balances at 1 November 2022		370,043	267,532	27,404	664,979
Fund balances at 31 October 2023		591,783	235,990	24,077	851,850

PLANT HERITAGE

BALANCE SHEET

AS AT 31 OCTOBER 2024

	Notes	2024 £	£	2023 £	£
Fixed assets					
Intangible assets	15		65,800		79,610
Tangible assets	16		4,923		4,708
			<u>70,723</u>		<u>84,318</u>
Current assets					
Debtors	17	29,525		16,609	
Cash at bank and in hand		732,206		791,991	
		<u>761,731</u>		<u>808,600</u>	
Creditors: amounts falling due within one year	18	(32,725)		(35,105)	
		<u></u>		<u></u>	
Net current assets			729,006		773,495
Total assets less current liabilities			799,729		857,813
Creditors: amounts falling due after more than one year					
Deferred income	20	4,613		5,963	
		<u></u>	(4,613)	<u></u>	(5,963)
Net assets			<u>795,116</u>		<u>851,850</u>
The funds of the charity					
Restricted income funds	23		23,420		24,077
Unrestricted funds - general	24		582,266		591,783
Unrestricted funds - designated	22		189,430		235,990
			<u>795,116</u>		<u>851,850</u>

PLANT HERITAGE

BALANCE SHEET (CONTINUED)

AS AT 31 OCTOBER 2024

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 October 2024.

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 20 March 2025.



Mr G Morgan

Trustee

Company registration number 2222953 (England and Wales)

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 OCTOBER 2024

1 Accounting policies

Charity information

Plant Heritage is a private company limited by guarantee incorporated in England and Wales. The registered office is First floor offices, Stone Pine House, Wisley, Woking, Surrey, GU23 6QD.

1.1 Accounting convention

The financial statements have been prepared in accordance with the charity's governing document, the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) 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)". 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 applying FRS 102 Update Bulletin 1 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, [modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value]. 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 or grantors 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.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

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.

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.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

1 Accounting policies

(Continued)

1.5 Expenditure

A liability is recognised when either a constructive or legal obligation is identified. Central costs are apportioned between costs of generating funds and charitable activities on the basis of the specific activities of members of staff. Irrecoverable VAT is allocated to the same expenditure heading as the cost to which it relates. Basic financial liabilities are recognised at transaction cost.

1.6 Intangible fixed assets other than goodwill

Intangible assets acquired separately from a business are recognised at cost and are subsequently measured at cost less accumulated amortisation and accumulated impairment losses.

Intangible assets acquired on business combinations are recognised separately from goodwill at the acquisition date where it is probable that the expected future economic benefits that are attributable to the asset will flow to the entity and the fair value of the asset can be measured reliably; the intangible asset arises from contractual or other legal rights; and the intangible asset is separable from the entity.

Amortisation 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:

Website	8 Years Straight Line
Persephone intangibles	4 years straight line

1.7 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:

Plant and machinery	4 Years Straight Line
Computers	4 Years 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.

1.8 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

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.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

1 Accounting policies

(Continued)

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.

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.11 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

1.12 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) *FOR THE YEAR ENDED 31 OCTOBER 2024*

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)
FOR THE YEAR ENDED 31 OCTOBER 2024

3 Income from donations and legacies

	Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Restricted funds 2024 £	Total 2024 £	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Restricted funds 2023 £	Total 2023 £
Donations and gifts	76,026	2,245	6,000	84,271	48,005	1,993	6,333	56,331
Legacies	11,476	-	-	11,476	250,581	-	-	250,581
Grants	-	-	5,292	5,292	2,725	-	39,413	42,138
	87,502	2,245	11,292	101,039	301,311	1,993	45,746	349,050

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

4 Income from charitable activities

	Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Total 2024 £	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Total 2023 £
Memberships and shows						
Sales within charitable activities	142,252	-	142,252	141,810	-	141,810
Educational Meetings and Events held by Area Groups						
Sales within charitable activities	7,805	105,025	112,830	5,538	106,893	112,431
	<u>150,057</u>	<u>105,025</u>	<u>255,082</u>	<u>147,348</u>	<u>106,893</u>	<u>254,241</u>

5 Income from other trading activities

	Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Total 2024 £	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Total 2023 £
Advertising, publications, sponsorship and trading	16,053	-	16,053	15,804	-	15,804
Fundraising events	-	3,278	3,278	-	7,177	7,177
Total other trading activities	<u>16,053</u>	<u>3,278</u>	<u>19,331</u>	<u>15,804</u>	<u>7,177</u>	<u>22,981</u>

6 Income from investments

	Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Total 2024 £	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Total 2023 £
Interest receivable	<u>29,034</u>	<u>702</u>	<u>29,736</u>	<u>12,335</u>	<u>508</u>	<u>12,843</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

7 Expenditure on raising funds

	Unrestricted funds 2024 £	Unrestricted funds 2023 £
Costs of generating donations and legacies		
Staging fundraising events	216	731
Other fundraising costs	7,150	-
Depreciation and impairment	-	625
Support costs	-	1,838
	7,366	3,194

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2024

8 Charitable activities

	Membership and Shows 2024 £	Educational Activities 2024 £	Plant Conservation 2024 £	Total 2024 £	Membership and Shows 2023 £	Educational Activities 2023 £	Plant Conservation 2023 £	Total 2023 £
Staff costs	33,260	33,259	96,806	163,325	23,530	23,495	102,650	149,675
Depreciation and impairment	7,234	7,233	21,700	36,167	5,248	5,248	22,930	33,426
Other charitable expenditure	19,236	89,952	48,787	157,975	15,726	108,759	32,254	156,739
	<u>59,730</u>	<u>130,444</u>	<u>167,293</u>	<u>357,467</u>	<u>44,504</u>	<u>137,502</u>	<u>157,834</u>	<u>339,840</u>
Grant funding of activities (see note 9)	-	-	1,916	1,916	-	216	1,662	1,878
Share of support costs (see note 10)	16,506	16,508	49,523	82,537	15,421	15,421	67,376	98,218
Share of governance costs (see note 10)	2,528	2,527	7,581	12,636	1,458	1,458	6,198	9,114
	<u>78,764</u>	<u>149,479</u>	<u>226,313</u>	<u>454,556</u>	<u>61,383</u>	<u>154,597</u>	<u>233,070</u>	<u>449,050</u>
Analysis by fund								
Unrestricted funds - general	76,059	85,342	213,914	375,315	40,839	82,303	191,117	314,259
Unrestricted funds - designated	2,705	62,671	1,916	67,292	14,762	69,294	1,662	85,718
Restricted funds	-	1,466	10,483	11,949	5,782	3,000	40,291	49,073
	<u>78,764</u>	<u>149,479</u>	<u>226,313</u>	<u>454,556</u>	<u>61,383</u>	<u>154,597</u>	<u>233,070</u>	<u>449,050</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

9 Grants payable

	Plant Conservation 2024 £	Total 2024 £	Educational Activities 2023 £	Plant Conservation 2023 £	Total 2023 £
Grants to institutions:					
Other	1,916	1,916	-	1,662	1,662
Grants to individuals	-	-	216	-	216
	<u>1,916</u>	<u>1,916</u>	<u>216</u>	<u>1,662</u>	<u>1,878</u>

10 Support costs allocated to activities

	2024 £	2023 £
Staff costs	40,385	27,033
Office costs	42,153	73,023
Governance costs	12,635	9,114
	<u>95,173</u>	<u>109,170</u>
Analysed between:		
Fundraising	-	1,838
Memberships and shows	19,034	16,879
Educational Activities	19,035	16,879
Plant Conservation	57,104	73,574
	<u>95,173</u>	<u>109,170</u>

	2024 £	2023 £
Governance costs comprise:		
Independent Examination / Audit	4,392	7,914
Legal and professional fees	8,104	1,200
Other governance costs	139	-
	<u>12,635</u>	<u>9,114</u>

11 Net movement in funds

	2024 £	2023 £
The net movement in funds is stated after charging/(crediting):		
Depreciation of owned tangible fixed assets	2,485	3,945
Amortisation of intangible assets	33,682	30,107
	<u></u>	<u></u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

12 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year.

1 of the trustees (2023: none) incurred reimbursed travel expenses of £19.

13 Employees

The average monthly number of employees during the year was:

	2024 Number	2023 Number
Plant Conservation	3	4
Membership	2	1
Finance and admin	1	1
Total	6	6

Employment costs

	2024 £	2023 £
Wages and salaries	184,682	161,318
Social security costs	9,873	7,341
Other pension costs	9,155	8,049
	203,710	176,708

8 (2023: 8) part time employees equate to 5 (2023: 6) full time staff.

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

Remuneration of key management personnel

The remuneration of key management personnel was as follows:

Chief Executive, Business Manager and Conservation Manager roles.

	2024 £	2023 £
Aggregate compensation	99,118	56,482

14 Taxation

The charity is exempt from taxation on its activities because all its income is applied for charitable purposes.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

15 Intangible fixed assets

	Website £	Persephone intangibles £	Total £
Cost			
At 1 November 2023	59,336	97,146	156,482
Additions - internally developed	4,194	15,681	19,875
At 31 October 2024	63,530	112,827	176,357
Amortisation and impairment			
At 1 November 2023	32,864	44,011	76,875
Amortisation charged for the year	7,417	26,265	33,682
At 31 October 2024	40,281	70,276	110,557
Carrying amount			
At 31 October 2024	23,249	42,551	65,800
At 31 October 2023	26,475	53,135	79,610

16 Tangible fixed assets

	Plant and machinery £	Computers £	Total £
Cost			
At 1 November 2023	2,909	15,600	18,509
Additions	-	2,700	2,700
At 31 October 2024	2,909	18,300	21,209
Depreciation and impairment			
At 1 November 2023	744	13,057	13,801
Depreciation charged in the year	727	1,758	2,485
At 31 October 2024	1,471	14,815	16,286
Carrying amount			
At 31 October 2024	1,438	3,485	4,923
At 31 October 2023	2,165	2,543	4,708

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

17 Debtors

	2024 £	2023 £
Amounts falling due within one year:		
Trade debtors	7,131	5,870
Other debtors	18,467	7,380
Prepayments and accrued income	3,927	3,359
	<u>29,525</u>	<u>16,609</u>

18 Creditors: amounts falling due within one year

	Notes	2024 £	2023 £
Deferred income	20	18,520	17,447
Trade creditors		-	7,548
Other creditors		6,946	36
Accruals		7,259	10,074
		<u>32,725</u>	<u>35,105</u>

19 Creditors: amounts falling due after more than one year

	Notes	2024 £	2023 £
Deferred income	20	<u>4,613</u>	<u>5,963</u>

20 Deferred income

	2024 £	2023 £
Other deferred income	<u>23,133</u>	<u>23,410</u>

Deferred income is included in the financial statements as follows:

	2024 £	2023 £
Deferred income is included within:		
Current liabilities	18,520	17,447
Non-current liabilities	4,613	5,963
	<u>23,133</u>	<u>23,410</u>

Movements in the year:

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

20	Deferred income		(Continued)
	Deferred income at 1 November 2023	23,410	28,331
	Released from previous periods	(16,097)	(28,331)
	Resources deferred in the year	15,820	23,410
	Deferred income at 31 October 2024	23,133	23,410

21	Retirement benefit schemes	2024	2023
		£	£
	Defined contribution schemes		
	Charge to profit or loss in respect of defined contribution schemes	9,155	8,049

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently administered fund.

22 Unrestricted funds - designated

These are unrestricted funds which are material to the charity's activities.

	At 1 November 2023	Incoming resources	Resources expended	Transfers	At 31 October 2024
	£	£	£	£	£
Area Groups	145,752	111,250	(64,587)	(52,985)	139,430
Office Move	1,865	-	(1,865)	-	-
IT investments/CRM	28,373	-	(840)	22,467	50,000
Risk Reserve	60,000	-	-	(60,000)	-
	235,990	111,250	(67,292)	(90,518)	189,430

Previous year:	At 1 November 2022	Incoming resources	Resources expended	Transfers	At 31 October 2023
	£	£	£	£	£
Area Groups	162,532	116,571	(70,956)	(62,395)	145,752
Office Move	15,000	-	(13,135)	-	1,865
CRM	30,000	-	(1,627)	-	28,373
Risk Reserve	60,000	-	-	-	60,000
	267,532	116,571	(85,718)	(62,395)	235,990

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

22 Unrestricted funds - designated

(Continued)

Area Groups

Area Groups carry out activities throughout the year in accordance with the charity's objectives whilst remaining sympathetic and relevant to each group as defined by its members and geographical location. The Designated Fund represents the income and expenditure from group activities and the value retained in bank accounts as at the period end.

Project Fund

The Project Fund provides for spending on specific projects planned for the short to medium term.

Office Move

To fund the relocation costs associated with changing office.

CRM

To fund a new customer relationship management system.

Risk Reserve

For future operational shocks such as COVID.

23 Restricted funds

The restricted funds of the charity comprise the unexpended balances of donations and grants held on trust subject to specific conditions by donors as to how they may be used.

	At 1 November 2023	Incoming resources	Resources expended	At 31 October 2024
	£	£	£	£
	-	-	-	-
Heritage Lottery	11,589	5,292	(6,544)	10,337
RHS - Research	-	2,500	(1,000)	1,500
RHS - Workshops	-	1,500	(466)	1,034
Heather Society	6,500	-	-	6,500
Persephone	5,988	2,000	(3,939)	4,049
	<u>24,077</u>	<u>11,292</u>	<u>(11,949)</u>	<u>23,420</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

23 Restricted funds

(Continued)

Previous year:	At 1 November 2022	Incoming resources	Resources expended	At 31 October 2023
	£	£	£	£
Shanly Foundation	-	2,500	(2,500)	-
Stanley Smith Horticultural Trust	-	3,800	(3,800)	-
Heritage Lottery	10,952	39,413	(38,776)	11,589
Tanner Trust	907	-	(907)	-
Heather Society	6,500	-	-	6,500
Persephone	8,045	33	(2,090)	5,988
West Midlands Shows Fund	1,000	-	(1,000)	-
	<u>27,404</u>	<u>45,746</u>	<u>49,073</u>	<u>24,077</u>

Heritage Lottery - Funding for a Digital Volunteer Officer, saving and sharing digital plant heritage.

Persephone - Funding for the development and operation of an online horticultural database developed for recording plants in collections.

RHS Research - For research bursaries.

RHS Workshops - Assistance fund for those attending Plant Heritage workshops.

Heather Society - For the advancement of horticulture, in particular conservation, improvement and research into the growing of heaths, heathers and allied plants.

The Stanley Smith Horticultural Trust - Funding for the national collection holders' conference and 45th Sapphire celebration event.

Shanly Foundation - Funding for a display garden at the RHS Hampton Court Flower Show.

Tanner Trust - Funding for JSTOR licences (an online platform providing access to research articles).

24 Unrestricted funds

The unrestricted funds of the charity comprise the unexpended balances of donations and grants which are not subject to specific conditions by donors and grantors as to how they may be used. These include designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes.

	At 1 November 2023	Incoming resources	Resources expended	Transfers	At 31 October 2024
	£	£	£	£	£
General funds	<u>591,783</u>	<u>282,646</u>	<u>(382,681)</u>	<u>90,518</u>	<u>582,266</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

24 Unrestricted funds

(Continued)

Previous year:	At 1 November 2022	Incoming resources	Resources expended	Transfers	At 31 October 2023
	£	£	£	£	£
General funds	370,043	476,798	(317,453)	62,395	591,783

25 Analysis of net assets between funds

	Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Restricted funds 2024 £	Total 2024 £
At 31 October 2024:				
Intangible fixed assets	64,674	-	1,126	65,800
Tangible assets	4,923	-	-	4,923
Current assets/(liabilities)	517,282	189,430	22,294	729,006
Long term liabilities	(4,613)	-	-	(4,613)
	582,266	189,430	23,420	795,116
	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Restricted funds 2023 £	Total 2023 £
At 31 October 2023:				
Intangible fixed assets	77,984	-	1,626	79,610
Tangible assets	4,708	-	-	4,708
Current assets/(liabilities)	515,054	235,990	22,451	773,495
Long term liabilities	(5,963)	-	-	(5,963)
	591,783	235,990	24,077	851,850



Origanum 'Kent Beauty'

Please get in touch if you would like to know more:

www.plantheritage.org.uk

Email: Info@PlantHeritage.org.uk

Or call us on 01483 447540

Address: First Floor Offices, Stone Pine, Wisley Lane,
Wisley, Woking, Surrey, GU23 6QD, UK

PLANT HERITAGE

England & Wales - Charity number 1004009

Accounts



Report of the Trustees and Unaudited Financial Statements
for the Year ended 31 October 2023

Registered Charity No: 1004009/SC041785
Company Registered No 2222953

Patron	The former Prince of Wales
President	Alan Titchmarsh
Vice-Presidents	Christopher Brickell Jamie Compton Lady Hamilton Roy Lancaster Sir Roy Strong Elizabeth Banks David Knott Sarah Bray Michael Marriott
Trustees	Mrs C Bufton (Chairman) Mr J Marshall (Vice Chairman) Mr G Morgan (Treasurer) Mrs C Penny Mrs E Crawforth Mrs S Nex Ms H Triggs (resigned Feb 2023) Mr A Stones (resigned Dec 2022) Mrs M Lloyd (resigned Dec 2022) Ms K Kapoor Mr J Sheppard (joined Dec 2022, resigned Jan 2024)
Charity Number	1004009/SC041785
Company Number	2222953
Auditor	Frances Wilde FCCA DChA Warner Wilde, Chartered Certified Accountants 4 Marigold Drive Bisley Surrey GU24 9SF
Plant Heritage office	First Floor Offices, Stone Pine, Wisley, Woking, Surrey, GU23 6QD

		Page
	Patron, Presidents and Trustees of the Charity*	2
	Annual General Meeting 2023*	4
	Activities in 2022/23: What Plant Heritage does*	5
	Chairman's Review*	6-7
	Objectives and Achievements*	8-21
	Treasurer's Financial Review*	22-23
	Fundraising Activities*	24-25
	Structure, Governance and Management*	26-28
	Statement of Trustees' Responsibilities	29
	Report of the Auditor	30-32
	Statement of Financial Activities	33-34
	Balance Sheet	35-36
	Notes to the Financial Statements	37-52
	*These sections form part of the Trustee's Annual Report	

Annual General Meeting 2024

All members of Plant Heritage have been invited to meet members of the Board (who are Trustees of Plant Heritage) and ask questions on past performance and future plans at the 2024 Annual General Meeting which will be a virtual event on Thursday the 25th April.

Questions about anything contained in this report or the accompanying Financial Statements, should be addressed to the Chairman, by email chairman@plantheritage.org.uk or if that is not possible, by mail Plant Heritage, First Floor Offices, Stone Pine, Wisley Woking, Surrey, GU23 6QD, or telephone 01483 447540.

Plant Heritage

Conserving the diversity of cultivated plants is essential to all our futures. The plants grown in National Plant Collections® or held by Plant Guardians® contain unique combinations of genetic material which are the legacy of generations of plant collectors and breeders who have built our nation's rich and unique horticultural landscape. The work of Plant Heritage spans more than four decades and in the light of climate change and an increasingly urban society, which values horticulture as important to its health and well-being, the charity's work is as important now as it was in the 1970s, when the charity's founders determined that a significant part of the nation's rich horticultural heritage was at risk of disappearing.

Our work is spearheaded by a network of National Collection Holders who come from all walks of life and live across the length and breadth of the British Isles. The beauty of the National Plant Collections is that anyone who has an interest, passion or expertise in a certain group of plants, whether amateur or professional can potentially become a collection holder. In doing so they curate and cultivate their own living collection which then forms part of the largest living collection of garden plants held outside botanical institutions in the UK.

Our National Collection Holders are supported by a dedicated Central Office team including Plant Conservation specialists who provide technical support across the British Isles. This network is strengthened by our regional network of volunteer Collection Coordinators who regularly visit Collection Holders whilst also seeking out new and potential collections. All applications are then guided through the process by the Plant Conservation Committee. Members of this committee are independent advisers, experts in taxonomy, horticulture, botany and the horticultural trade and area group representatives, all volunteers who give their time to ensure National Plant Collections are maintained and looked after to a consistent standard.

Plant Heritage has developed its own online plant records software, Persephone, to provide a secure system to store and share details of plants in National Plant Collections and Plant Guardians. Persephone now holds the records of more than 150,000 plants, making it a valuable asset for everyone interested in plants and plant conservation.

The Threatened Plants Programme underpins our conservation work and is an ongoing research initiative which identifies plants threatened and worthy of conserving. The Plant Guardian® scheme encourages members to actively seek out and conserve individual plants. Plant Heritage's education objective is delivered by both our regional groups and the Central Office through a diverse range of events, shows, publications, workshops and other activities. As a charity, Plant Heritage is funded through membership subscriptions, donations from individuals and industry, sponsorship and donations from charitable trusts.

What are the threats to our garden plants?

Changing fashions

Changes in styles of planting and taste can cause groups of plants to go out of fashion. We don't want to lose the range of cultivars available for when they inevitably come back into fashion

Changes to the plant sales trade

The requirement for plants to be of a specific size and in flower at the point of sale by garden centres and supermarkets can lead to a diminution of the range of plants grown in our gardens. We are also losing specialist plant nurseries who carry a much wider range of plants

Climate change

Climate change over time will have a continuing effect on the range of cultivated plants available to the UK.

Pests and pathogens

Due to the nature of modern trade and travel there is an increasing risk of new pests and diseases being introduced to the UK. Recent examples of these include box blight, ash dieback, and agapanthus gall midge.

Loss of propagation or cultivation skills

A lack of horticultural skills, particularly in propagation, is causing a loss in the availability of specialist cultivated plants.

Chairman's Review

As we celebrated our 45th anniversary in September 2023, we pondered whether those who founded our mission, realised what they had set in motion. Their vision has established an invaluable legacy – a national asset of plants and their data that volunteers work every day to maintain. We welcome this milestone with a record number of collections (now over 700) and the realisation that there is still a considerable amount of work to be done to raise awareness of the importance of cultivated plants. The true value of biodiversity is often recognised only when it is threatened and the social and cultural value of cultivated plants is best highlighted by the growing awareness of the benefits that plants and gardening can bring to our environments, our communities and ourselves.

We were delighted that four individuals who have exhibited outstanding dedication to the world of horticulture and have inspired us all, agreed to join us as Vice Presidents:

David Knott DHE SHM CHort FIHort. Curator of Living Collections, Royal Botanic Garden Edinburgh, currently home to 9 Plant Heritage collections.

Elizabeth Banks CBE, DL, CMLI, F.Hort. RHS President Emeritus. A landscape architect who has specialised in enabling the restoration of historic landscapes, having recreated several historic gardens throughout Europe and the USA.

Sarah Bray. owner and manager of High Beeches Garden in West Sussex; 27 acres of enchanting landscaped woodland & water garden planted with many rare trees and shrubs and the home of the national collection of '*Stewartia monodelpha*'.

Michael Marriot. One of the world's leading rosarians, best known for his work at David Austin, recently retired but still very much involved in both the rose and gardening world lecturing, writing, designing and consulting.

Our end of year financial position for 2022/23 resulted in a surplus of £186,871, mostly due to legacy income of £250,581. Recognising that legacies are not a predictable income source, but one that has given us a solid increase to our reserves, Trustees decided to proceed with plans to recruit a CEO to help us diversify our income sources. We were thrilled to appoint Gwen Hines, an experienced charity leader, to the post starting in March 2024. We thank all who leave us a gift in their will, their generosity enables us to protect the nation's legacy of cultivated plants

We completed our office move to newly refurbished offices at the world-renowned RHS Garden Wisley. We would like to thank the RHS for their support in making this happen as it provides a great office location and enables our team to enjoy a closer working relationship with the RHS specialists to research and save more garden plants.

Our Threatened Plant of the Year competition continues to attract entrants and this year a rare *Chaenomeles speciosa* 'Contorta' – an ornamental quince, was crowned the judge's winner. The competition's People's Choice award, as nominated by visitors to the RHS Hampton Court Garden festival and online, was a pretty pink *Rhododendron* 'The Dowager'. Cared for by the team at Leonardslee Lakes and Gardens in Sussex, this plant is from the recently accredited National Plant Collection of

Rhododendron (Loder collection).

This year's recipient of the prestigious Brickell award, in recognition for his ongoing contribution to plant conservation and horticulture, was Adrian Young, for his extensive research into his *Saxifraga* National Plant Collections. This award is named after Plant Heritage's founding member and current Vice-President Chris Brickell and celebrates excellence in cultivated plant conservation.

A main pillar of our work is to inform and engage others with our conservation work, and our communications team have succeeded in getting reports of our activities into the horticultural and gardening press as well as into the general press and local radio programmes. We were particularly delighted that following our presence at Hampton Court Garden festival, Gill Groombridge was interviewed by The Guardian who published an article online and in print about the National Plant Collections and the Missing Genera. We are also excited about a five-page feature about Plant Heritage, the 45th anniversary and the National Plant Collections, published in The English Garden.

Plant Heritage joined the Future National Gardens Group, convened by the RHS and including most of the major garden societies across the nations. This group aims to work on topics where collective action could make a difference to the future of horticulture and role of national gardens, such as the role of gardens in addressing sustainability and biodiversity; raising awareness of the importance of UK national gardens for tourism and the economy and the development of a horticultural skills programme to support the future of the sector.

Our National Lottery Heritage Fund (NLHF) digitisation project has enabled us to launch a new online catalogue, capturing images and vital information about over 200 rare garden plants cared for by Plant Guardians. This online resource will enable those working in horticulture, amateur gardeners and anyone looking for an unusual plant to access information which is vital to ongoing garden plant conservation. The information has been researched and uploaded to Plant Heritage's website by volunteers recruited through the NLHF's Digital Skills for Heritage initiative, which has created hundreds of digital volunteering roles at heritage organisations across the UK.

There were three resignations from the Board in this financial year.

Our work relies on Members and others, volunteering their time and expertise in building and maintaining the National Plant Collections and becoming Plant Guardians, caring for individual plants. We also rely on our Groups and the generosity of members and supporters, to fund our work through plant sales, events, legacies, grants and donations. Together we are the stewards of the collections, helping to conserve the plants, supporting the safe storage of the related records and data as well as learning all we can from the collection holders themselves, so that full provenance for a collection is attained. I would like to record the collective thanks to you all, from the Board of Trustees.



Cecilia Bufton
Chairman

Date 20th March 2024

Trustees Report – Objectives and Achievements

The Board, who are the Trustees of Plant Heritage (“the Charity”), present their annual report for the year ended 31 October 2023, prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity’s governing document, the small companies regime s419(2) Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) and “Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)”

Objectives:

Plant Heritage’s charitable purposes seek to

- promote the conservation of cultivated plants with a focus on endangered or rare garden plants
- encourage and carry out research into the cultivation of rare or endangered plants and related information
- encourage the education of the public in horticultural skills, particularly with regards to cultivated plant conservation
- encourage the introduction and the propagation of rare, cultivated plants not represented in the UK, within the law

We aim to do this by:

- Conserving our horticultural heritage by keeping living examples of plants in the **National Plant Collections**[®] scheme which enables us to coordinate collections, ranging from cultivated and species, to historical, heritage and scientific
- Identifying cultivars at the highest risk of extinction, with the ambition that these can be conserved. We do this through our **Threatened Plants Programme**[™]
- Encouraging individuals to conserve individual plants in the **Plant Guardian**[®] scheme, a register of holders of rare and unusual plants
- Sharing rare plants with gardeners across the UK, through our annual **Plant Exchange**[™]
- Documenting and recording collections of rare plants. This is done by our National Collection Holders and Plant Guardians and in our publications such as the *Directory*, *The Journal*, and through our online plant recording database **Persephone**
- Increasing the variety of garden plants available for gardens in the UK through supporting and undertaking group propagation activities and plant sales
- Ensuring rare plants and collections are supported in perpetuity (for future generations)
- Supporting Plant Guardians and National Collection Holders in their conservation work
- Educating the public in the importance of our work
- Working in partnership with organisations that can support our objectives
- Raising **funds** to support this work

Achievements:

Our Conservation Work

Plants growing in gardens might seem safer than those in the wild, but they can easily be lost forever if nobody is looking after them. Plant Heritage is the only organisation with the aim of conserving garden plants across the British Isles and Ireland.

Our cultivated flora is incredibly rich, resulting from development and care over centuries by dedicated gardeners. The heritage contained in these living organisms can only be preserved by active gardeners in living collections. These plants are a valuable historical and future resource, whether for their beauty, or having edible, medicinal or other useful properties. Each has a unique genetic code making it impossible to replace if lost. Conservation of a diverse range of plants underpins our resilience to a changing world, while meeting challenges such as climate change, pests and diseases and biodiversity loss.

Our conservation work is carried out in line with a five-year strategy that helps us to keep to the highest conservation standards and is delivered through working with National Plant Collection® holders, our volunteers and supporters.

Our conservation strategy aims to:

1. increase the number of cultivated plants conserved
2. develop and maintain good standards of curation
3. inform and engage others with our conservation work
4. influence global thinking on issues around plant conservation

Why do we do it?

Plants have always been selected and bred, whether for their beauty, flavour, scent or other reasons. This breeding involves an enormity of human effort and inventiveness that is wasted if the plants cease to be grown.

Climate change, the advance of new pests and diseases, loss of gardens, a diminishing nursery trade and lack of knowledge in the general population all conspire to reduce the diversity of our garden flora. If garden plants go, a tantalising slice of social, cultural and horticultural history dies with them.

We believe that cultivated plants deserve to be a target for conservation. Each one contains a unique combination of genetic material and is testament to human effort and inventiveness.

How do we do it?

Objective 1: Increase the number of cultivated plants actively conserved by Plant Heritage across the British Isles and Ireland

National Plant Collections®

National Plant Collections are held by individuals or organisations who undertake to document, develop and conserve a comprehensive collection of plants within a defined scope and hold them in trust for the future. The scope can be defined botanically by plant group, either taxonomically, such as all the *Penstemon* cultivars or *Rhododendron* subsect. *Falconera*; or have a shared history such as plants collected by Harold Comber; or a geographic link, such as North West English apple cultivars.

National Plant Collections are made available for people to view, either by appointment, on special open days or as part of a garden open to the public. They contain about 95,000 plants, held across the 700 collections. Together this represents a huge resource for gardeners, nurserymen, garden designers, researchers, plant breeders and those interested in historical gardens and landscapes. Having these plants part of a registered conservation scheme ensures that they will be a resource for generations to come.

National Plant Collections are valuable for assessing the best cultivars for gardeners to enjoy and are used for scientific research, as a source of live plants and genetic material available for investigating a group of plants. They also provide insurance, being “living libraries” of the genetic diversity of garden plants. There are still some important groups of garden plants that are not represented in National Collections

Plant Heritage supports collectors, helping them to tend, monitor and share their collection, guaranteeing the preservation of our garden flora. Members of our Groups all over the country, work together propagating plants and running plant exchanges and sales for funding. The groups also provide collection co-ordinators to advise the collectors and assess the collections.

The National Plant Collections scheme is overseen by the Plant Collections Committee, a sub-committee of the Board, whose members are independent advisers, experts in taxonomy, horticulture, botany and the horticultural trade and area group volunteers. The committee rigorously assesses new applications for scope and coverage.

Winter 22-23 proved very hard on a number of collections, some losing significant numbers of plants that have previously never known such a difficult winter.

As of the end of November 2023, there are 706 National Plant Collections of which 338 are Horticultural, 282 Reference and 85 Historic collections, with 19 having been awarded Scientific status. In 2023 we accredited 40 new collections (28 in 2022), including one new Dispersed Collection. Scientific status was awarded to the *Dryopteris* collection, held by Anthony Pigott. There were 45 new proposals submitted in 2023, this is sustaining the already elevated numbers we saw in 2020/21, so it is positive to see a continued interest in people wanting to start collections. 20 collections are withdrawing (19 in 2022), seven of which are handing on plants to another site or collection.

Threatened Plants Programme

The Threatened Plants Programme (TPP) tracks the locations and availability of garden cultivars and works out how rare or threatened they are. Information from the Threatened Plants Programme helps collection holders prioritise their sourcing and propagation.

Plant Guardians can now see if a plant has been assessed as Threatened by the TPP, by looking at the records in Persephone. This can be updated annually after the latest Plant Finder update.

The TPP currently holds information, for the UK and Ireland specifically, on 129,204 different named cultivars in 1,604 genera; 5,955 (5%) of which are additional to the RHS' public Find a plant online database. Information includes trade names, synonyms, Plant Breeders' Rights (PBR), awards, first and last dates listed in Plant Finder (1987-2023), first and last dates grown (1562-2023), occurrence in National Plant Collections (past, present and proposed), Plant Exchanges, Plant Guardians, Threatened Plant of the Year, botanic and historic gardens; and more from International Cultivar Registration Authorities, referees, archived files and online sources. Conservation status is calculated by Plant Heritage within the programme. Assessments are reported as data or in written reports, internally and for external partners such as the RHS and specialist societies, to promote and support active conservation of threatened and near-threatened garden cultivars.

Plant Guardians®

To preserve plants, it is essential that we keep them growing in gardens. Plant Heritage encourages members to take active part in conservation work by becoming a Plant Guardian. Through the scheme, rare plants are grown in multiple locations as an insurance against loss. Plant Heritage retains a record of plants in guardianship and encourages Plant Guardians to propagate the plants they are caring for and share them with other members via plant sales and the Plant Exchange

By October 2023 there was a total of 2,293 plants, with 264 plants registered during the year. Two plant societies and three gardens with significant historic plants have registered plants are unable to be scoped as a National Plant Collections, thus recording these as Plant Guardians has helped focus propagation and recognition of rare plants to enhance sharing of plant material more widely. 692 plants are assessed as threatened in cultivation by our Threatened Plant Programme and 24 plants are assessed at various levels of risk under the International Union for Conservation of Nature's Red List of threatened species.

Thanks to the National Lottery Heritage Fund we were able to create an online catalogue of plants held in the Plant Guardian scheme on our website. This catalogue has a short description and an image of plants, plus an assessment of whether the plant is Threatened in Cultivation. This catalogue will continue to be developed.

Plant Exchange

The best way to conserve rare plants is to propagate and share them. The Plant Exchange enables hard to find plants being cultivated and conserved by members around the country to be shared with other members. By distributing plants around the country, we can re-establish plants in danger of being lost and give members the chance to get hold of something rare or unusual. We encourage members to

propagate these plants and pass them on, to help secure their future. We also encourage registration of these plants in our Plant Guardian scheme.

In 2023, the Plant Exchange was held as part of a member's day in Bristol - 15 groups took part, with 1001 plants being offered (previous year 18 groups, 782 plants).

The Plant Exchange for 2024, will be held in Stranraer, at the Members weekend to be hosted by the Dumfries & Galloway Group.

Objective 2: Develop and maintain good standards of curation for all plants held in our conservation schemes

Coordinators

Our team of volunteer coordinators are the key link with Collection Holders in their area. New posts are in South West Devon, Essex and Leicestershire. We have vacancies for Herts & Beds, Notts & Northants, Herefordshire, London and West Midland (the two latter are being temporarily covered by neighbouring counties.) Volunteer vacancies remain live on the website, and communication with existing coordinators, for people interested in shadowing an experienced coordinator in the role, is encouraged.

Persephone

Plant Heritage has been at the forefront of developing modern online plant records software. With a reputation for ease-of-use, Persephone is readily accessible to amateur gardeners, but also caters to the needs of professional gardeners working in large garden settings. Persephone now holds the records of more than 150,000 plants, making it a valuable asset for everyone interested in plants and plant conservation.

In 2023, Persephone was named the British Computer Society's UK IT Industry Charity (Third Sector) Project of the Year.

"Persephone was delivered through a small number of talented volunteers & staff to create a national asset for very small investment without which, much of our rich horticultural heritage could be lost. It demonstrated excellence from idea to adoption."

Comments from the Judges for the UK IT Industry Award.

Persephone is owned by Plant Heritage and is overseen by the Persephone Working Group and delivered by a team of volunteers and staff working together. During the year, the Persephone team responded to many user support requests via email and provided around 120 virtual 1:1 or group support sessions and 8 face-to-face workshops.

Records of National Plant Collections

We continue to work towards a fully comprehensive, searchable database of all the plants in the National Collections. 453 National Plant Collections are now recorded on Persephone, up from 293 in the previous year. In addition, Persephone holds the records of 85 proposed collections and 71 legacy collections. The work of importing new records to Persephone was assisted by a Digital Records Officer and 21 new 'Digital

Volunteers' recruited for the recent National Lottery Heritage Fund project.

The majority of the collections recorded on Persephone are held by private collection holders who have added a wealth of information to the site. Where National Collections are held in institutions that use other horticultural databases, they are asked to send a regular output of key data; these records are then managed, on their behalf, by Plant Heritage. Key information about plants recorded is shared with the Plant Conservation Team and National Collection Coordinators to facilitate management of the scheme and support conservation projects; users may also grant viewing access or various levels of edit access to plant enthusiasts around the world, so enabling a global exchange of information. The Persephone Team also supports best practice in plant curation by advising National Collection Holders on accessioning and labelling plants.

Records of other conservation schemes

Persephone is also used to manage the records of 'Desiderata' (hard-to-find plants that Collection Holders are seeking). Persephone users may record information about such plants on the site, and this information is visible to all Persephone Users, who may assist with finding them. During the year, staff have also extended the use of Persephone to manage information about over 10,000 accessions that have been included in the annual Plant Exchange between 2013 and 2023; this allows us to track the location and ownership of rare plants.

Persephone for Subscribers

Since the launch of Persephone 2.0 we have made it available to large/open gardens to use to record the plants in their gardens. The scheme has attracted a small, but growing number of subscribers, some in very well-known open gardens & arboreta around the UK; more than 25,000 accessions have been recorded by one garden alone. Use of Persephone by external organisations brings a sustainable income to the project and helps to extend Plant Heritage's conservation reach by helping other organisations to record their plants – including many rare plants - well.

Persephone for Members

Following a successful pilot project during 2023, we have also extended use of Persephone to Plant Heritage members as a benefit of membership. Members may record up to 500 plants in their private gardens by taking out our 'Membership Plus' subscription. Members with particular plant interests may use Persephone to share their records with each other, so facilitating exchange of horticultural information. Most current member users have indicated that they will be willing to share their records to support plant conservation projects.

Development

The Persephone software is regularly developed in response to requests from users and the Persephone team. Much of the technical development on Persephone during the year was focused on supporting work undertaken as part of the National Lottery Heritage Project.

National Lottery Heritage Fund (NLHF)

The NLHF project started in June 2022, which enabled us to train 22 volunteers to input collection records, providing over 722 volunteer hours in total which resulted in data from 169 collections (28,557 records) being added into Persephone. The project further helped us in developing a set of policies and procedures for working with remote volunteers so that this work can continue.

NLHF funding also supported the creation of a link for the new Plant Guardian page from Persephone to the website. This page has seen a 141% increase in visitors compared to the same period last year.

The digitisation project has also enabled more Plant Guardians to engage with their data on Persephone as well as providing the opportunity for us to add 10 years of Plant Exchange data and the Seed Shop onto the system.

Objective 3: Influence and guide future work in the field of conservation of cultivated plants

External events/collaboration

Plant Heritage was invited by CCVS (Conservatoire des Collections Végétales Spécialisées) - the French National Collections, to give a presentation on our work, to their international Conference in Paris in September. Emma Crawforth (trustee) and Lucy Pitman (PCO) attended.

Sharing guidance

Our programme of workshops to support Collection Holders and members continues. In particular we encourage a transition to peat free growing media through workshops and highlight results from the RHS peat free fellowship research, ensuring both Collection Holders and members are kept informed.

Our programme of virtual talks helps to share knowledge from National Collection Holders to members and all are open to the public.

Our press releases focus on new collections and succession successes - particularly relevant for Influencing and guiding amongst the amateur and individual sector by encouraging participation through showcasing case studies.

Workshops

12 workshops were held in the year, support by Trust & Foundations donations

- Persephone online plant recording: 5 in person workshops were held at Pershore College (Worcestershire), Crawley (Surrey), Bicton College (Devon) and Lytham Hall in the NW; at the Collection Holder conference at Chester Zoo.
- Herbarium workshop at RHS Rosemoor
- Plant Guardians research - online
- Peat free growing - online

- Photography workshop
- Displays at Shows workshop
- Seed Workshop at RHS Wisley

Objective 4: Align Plant Heritage with global thinking on sustainability, biodiversity, conservation and plant taxonomy

A response was submitted to the House of Lords Report on Horticulture, noting the value and importance of the National Plant Collections as a resource in horticulture.

We continue to participate in the UK Plant Genetic Resource (UKPGR) group which serves as the technical forum to discuss plant genetic resources issues, technical matters, the development of integrated programmes and provide policy advice for government departments. The primary concern for UKPGR is food production and we have facilitated the addition of data from apple collections to be listed in the European inventory of plant genetic resources (EURISCO), which aims to make the European plant genetic resources data available everywhere in the world.

Our peat statement is published on the website and our sustainability strategy is in progress.

Support for Collections

The 3 recipients of the Plant Heritage Bursary in 2023, projects including a botanical photography project, underground irrigation systems, and interpretation boards. One application was held over to 2024.

Missing genera campaign

The 'Missing Genera' campaign, launched in 2016, encourages people with a passion for plants to bring together a National Plant Collection of their own and join the Plant Heritage community in growing, sharing and saving plants.

The 2023 campaign highlighted the following plant groups, the majority being pollinator friendly: *Astrophytum*, *Campanula*, *Colocasia*, *Echinacea*, *Elaeagnus*, *Erigeron*, *Gaura* (*Oenothera* (G)) *Knautia*, , *Lysimachia*, *Osmanthus*, *Phygellus*, *Silene*

Twelve genera highlighted through the campaign that now have National Plant Collections are *Achillea*, *Arisaema*, *Aeonium*, *Ginkgo*, *Alcea*, *Eryngium*, *Tradescantia*, *Echinops*, *Verbena*, *Hoya*, *Cosmos* and *Thalictrum*.

Brickell Award

Adrian Young was this year's recipient of the Brickell award, for his extensive research into his *Saxifraga* National Plant Collections. The Award recognises excellence in cultivated plant conservation and has been awarded to a different National Plant Collection Holder every year since 2003. Named after Plant

Heritage's founding member and current Vice-President Chris Brickell, it also celebrates the extensive and ongoing commitment, passion and research of National Plant Collection Holders.

The judges applauded Adrian's ongoing research and work with both of his reference collections of *Saxifraga* sect. *Ligulatae* and *Saxifraga* sect. *Porphyron* subsect. *Porophyllum*. The judging panel also recognised Adrian's wider contribution to horticulture, as both a National Plant Collection Holder since 2012 and the International Cultivar Registration Authorities' Registrar for *Saxifraga* since 2010. His published works were also celebrated, including his book 'The Complete Checklist for *Porophyllum* Cultivars' which is considered the definitive work on *Porophyllum Saxifraga* and is now in its third edition.

Future of National Gardens Group

Plant Heritage have joined a new group, established by the President and CEO of the RHS, to include Chairs and CEOs from English Heritage, Historic Houses, Historic Royal Palaces, National Trust, National Trust for Scotland, National Garden Scheme, Woodland Trust, Commonwealth War Graves, Kew Gardens, Plantlife and Plant Network.

The group identified 4 topics for which working groups have been established to develop work plans where collective action could make a difference to the future of horticulture and the role of national gardens:

1. The role of gardens in tackling sustainability, climate and biodiversity crisis
2. The lack of people who opt to train in horticulture and its link to the wider green skills agenda in the UK
3. Raising the national profile of the importance of UK national gardens for tourism and the economy
4. Engagement with Government

Raising Public Awareness of the Need for Plant Conservation

By letting others know about what we do, we can gain their support for plant conservation, so Plant Heritage is actively engaged in sharing expertise. We continue to produce our in-print publications as we increase our presence on social media, and we exhibit at many local and national shows.

Membership and Volunteers

Membership decreased by 4.5% to 3,205 this year, with the loss of 403 members and 253 new members recruited. We thank all our members for their ongoing support of our conservation work.

We will continue to focus on:

- strong programme of talks, both in person and virtual, for both members and the public
- group events, visits and plant fairs
- educational programme of workshops
- focus to widen awareness of the importance of our work in plant conservation through publicity both locally and centrally, and by press and social media coverage, and widen our audience

Members are encouraged to participate in the activities of their local Group, of which there are 25 across the UK. The volunteer committees of the Groups put in a tremendous amount of effort to organise a programme of talks (some as hybrid events), plant fairs, visits and open days for their members and raise funds for the charity.

The support that our volunteers so generously give and the knowledge and experience that they share is hugely appreciated by the Board. Whether at local level, contributing to the group's activities, supporting the office, shows and our seed shop or Collections Coordinators supporting the National Collection Holders, their manpower is invaluable to us.

Related Parties

Two affiliated groups (Manx Plant and Garden Conservation Society and Guernsey) share the same objectives as Plant Heritage, and generously support our work. The charity has links with the Wiltshire Gardens Trust who also support our work, and the Irish Garden Plants Society.

Publications, Shows and Campaigns

Website

The website continues to promote and facilitate interest in Plant Heritage, offering an up-to-date search facility for the National Plant Collections, and the new catalogue of Plant Guardian plants, alongside a calendar of events and seasonal campaigns such as the missing genera campaign and Threatened Plant competition

Annual Directory

In 2023 we published the annual Directory of National Plant Collections 2023 which listed all National Plant Collections by genus and by county including full details of new collections accredited in 2023. This is issued free to members, but the information can also be accessed on our website so is freely available to the general public. We encourage members and the public to visit the National Collections to see for themselves the conservation efforts of the Collection Holders, and to see the wide range of plants that are being conserved. We thank all our National Collection Holders for opening their collections to the public. All collections are accessible to visitors whether by appointment, through specific open days, or business open days.

The Journal

The biannual editions, edited by Clare Hogan, highlight the conservation work of National Collection Holders. Their aim is to educate, inform and to encourage members to visit National Collections or take part themselves in conservation through the Plant Guardian scheme or Plant Exchange.

E-newsletters

In 2023 we sent 6 e-newsletters (3 focussed on member news and 3 focussed on news for Collection Holders with additional specific event focused e-newsletters, to keep our membership to date with news and events; and collection holders informed on legal, policy and regulatory matters.

Shows and key events

RHS Hampton Court Garden Festival

The Plant Heritage zone showcased a 45th sapphire celebration border, supported by Squires Garden Centres, the Shanly Foundation and Melcourt Industries. Daniel Myhill planted the border, in the style he keeps his National Collection of *Rosa persica* hybrids in his own garden, with a pollinator friendly focus. Roses, dahlias, nepeta and agapanthus were featured. The zone included educational displays of *Cosmos* by Jonathan Sheppard, *Hosta* (small and miniature by Jonathan Hogarth, two displays by Barry Clarke on *Calycanthus* and *Asclepias* & *Gomphocarpus*, and Hilliers (plants raised by) by Sir Harold Hillier Gardens. Jonathan Hogarth was awarded a Gold medal and Best in the Plant Heritage zone. New green plaques to highlight National Collections were introduced at the show. The Threatened Plant of the Year competition was featured, with the Plant Heritage Seed Shop raising funds through donations to support our conservation work. Thank you to all the volunteers who helped at this show and to members who donated seed.

We thank the RHS for their support at these shows.

45th Sapphire Celebration event

Held at RHS Hilltop on 27th September 2023 and attended by members from around the country. Alan Titchmarsh, the charity's president, enjoyed chatting about growing techniques with some of the 12 Collection Holders who created inventive tabletop displays. Tim Upson, chairman of the Plant Collections

Committee, highlighted the importance of the National Plant Collection® scheme through the years, while John Anderson, Keeper of the Garden at Windsor Great Park, discussed emerging issues facing all gardens in the face of environmental change. We also had short talks from Martin Young of the Dorset group, Catrina Fenton on the Heritage Seed Library's new *Symphytum* Collection, Mercy Morris on her and Samantha Green's two *Chlorophytum* Collections and Josh Egan Wyer on the Pershore *Penstemon* Collection. We are grateful to the RHS for supporting the event, and for the tours of RHS Wisley.

Regional Shows and local plant fairs

Local specialist plant fairs were held again in 2023 by many of our Groups, successfully raising funds in support of Plant Heritage. Large plant fairs continue at Helmingham Hall (Suffolk), Longstock Nurseries (Hampshire), RHS Bridgewater (North West Group), RHS Hyde Hall (Essex Group), RHS Rosemoor (Devon Group).

We thank all the local Groups and the volunteers involved in presenting these events.

Seed Shop

The Plant Heritage Seed Shop was a great success in 2023 raising money from donations, whilst encouraging more people to grow plants from seed, or to try growing a new plant, at the RHS Hampton Court Garden Festival, , in the online shop and at other plant fairs around the country.

Threatened Plant of the Year Competition

The Threatened Plant of the Year competition was run for the fourth year and the judging carried out at the RHS Hampton Court Palace Garden Festival. The competition, established in 2020, aims to highlight the message that cultivars can be lost if not actively grown. A secondary aim will be to attempt the re-introduction of winners and those shortlisted plants where possible. 12 entries were shortlisted and *Chaenomeles speciosa* 'Contorta', was the judges' winner. *Rhododendron* 'The Dowager' was the winner of the public vote.

Virtual talks programme

We continued to hold virtual zoom talks (open to all) during the winter season and will plan to continue this programme in 2024. Such talks help highlight the invaluable work of National Collection Holders whilst sharing knowledge and experience with our members.

Shows and key events for 2024

In 2024 we plan a display at our usual Plant Heritage zone at RHS Hampton Court Palace Garden Festival, to include a display of the Threatened Plant of the Year competition and displays by a number of collection holders.

Our Dumfries and Galloway group are organising a Members' Weekend on 10-12 May 2024 in Stranraer, with a visit to Logan Botanic Gardens.

Social media

Our website www.plantheritage.org.uk continues to be the main way we provide online information about the National Plant Collections around the country, how to apply for a collection or register a Plant Guardian, and also information about our 24 regional groups, 7 areas with local representatives, affiliated groups and their activities.

Plant Heritage's social media presence continues to grow through Twitter, Facebook and Instagram, and LinkedIn.

The Plant Heritage e-newsletters keep members and others informed of news and events and encourage the public to visit National Collections and get involved in conservation. Meanwhile Twitter, Instagram Facebook and LinkedIn continue to be used to engage the general public and horticulturalists through promoting an understanding of the diversity of garden plants and the need for conserving them.

Press coverage

Over the last year (1st November 2022 – 31st October 2023) an estimated 158 items* of media coverage have been generated. While this is less than last year's total of 217 items, this year the estimated potential audience reach is significantly higher with 840 million*, compared to last year's estimated 323 million.

*These figures are a conservative estimate as there is no formal media monitoring in place. Journalists are asked to share copies of their article so they can be shared and recorded where possible.

The breakdown (which includes national, regional, and gardening media outlets) is as follows:

- 33 broadcast interviews (same as 2021-2022)
- Three national newspaper articles (none in 2021-2022)
- Five regional newspaper articles (25 in 2021-2022, though 15 were via the Press Association)
- 27 magazine articles or features (70 in 2021-2022)
- 90 online articles or features (89 in 2021-2022)

The three most successful stories, in terms of number of media items, this year were: the Threatened Plant of the Year competition launch which generated 26 items (including 15 interviews given by Gill Groombridge across various BBC radio stations), the National Plant Collections accredited in September 2022 with the historic estates focus, with nine items, and the Missing Genera with eight items.

13 press releases were drafted and issued, compared to 11 in the previous reporting year. Due to time constraints and external deadlines, many stories have had to go out in quite quick succession, which may be why the overall media coverage total is slightly less this year.

Despite this year's total being less than the last reporting year, several articles, features and interviews in high-profile media outlets have been published this year, including The Guardian, the Daily Mail, a six-page feature in The Orchid Review, a five-page feature in The English Garden, a two page feature in Best of British and interviews on Gardening with the RHS and HortWeek's podcasts.

Current coverage (1st November 2023 – 31st October 2024) includes a four-page feature about three National Plant Collection Holders in The Lady magazine's November issue; articles on Computing,

PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2023

HortWeek, ProLandscaper and Landscaping Matters about Persephone winning the UK IT Industry Awards; and the Brickell Award and June National Plant Collections in Which? Gardening's November issue. The new Plant Guardian online catalogue PR was issued in November, with interest so far from Garden News, RHS The Plant Review, Garden Design Journal and RHS The Garden.

Treasurer's Financial Review

2023 has been another successful one for Plant Heritage, and the level of reserves established is enabling us to enter a new exciting phase for the charity in 2024. The financial success has again been driven by strong legacy income. Overall income was £639,115 (£498,189 in 2022) and expenditure was £452,244 (£392,776 in 2022). The net surplus for the year was therefore £186,871 (£105,413 in 2022).

Incoming resources

Following three very successful years for Income from Donations and Legacies, 2023 went even higher with income of £349,050 compared with £222,868 in 2022. This is an exceptional result and includes income from legacies of £250,581 (2022: £160,686). Income from legacies is difficult to predict but the strong income over the last three years has helped Plant Heritage to reach an excellent financial position and to be able to continue to invest strategically in our future from a sound financial platform. It was not only legacies and donations that performed well, income from charitable activities (Membership, Shows, Educational Meetings and Events) remained strong and was similar to the prior year £254,241 (2022: £254,109)

Resources expended

Plant Heritage spent a total of £452,244 (2022: £392,776) on Charitable Activities, Fundraising and Governance in 2023, continuing last year's trend to the return to normal activities post pandemic. Charitable expenditure, including on plant conservation was £449,050 (2022: £368,377). The costs of generating funds was £3,194 (2022: £24,399).

Intangible fixed assets

Intangible fixed assets include the cost of website development work as well as the costs of development of Persephone 2.0. The total value of intangible fixed assets at the end of the year was £79,610. The Trustees regularly review the value of intangible fixed assets as well as other fixed assets to the business.

Reserves policy

It is the policy of the Charity that unrestricted funds which have not been designated for a specific use, should be maintained at a level equivalent to six months general operating costs, including salaries. The Trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. This level of reserves has been maintained throughout the year and ended the year with £591,783 (2022: £370,043) in the general fund. There are a further £235,990 (2022: £267,532) of reserves designated towards specific purposes. Within the designated funds for specific purposes, there are reserves of £28,373 (2022: £30,000) towards the development of a new CRM and other necessary IT expenditure and a £60,000 risk reserve to provide a cushion against possible future sudden changes in the Charity's operating environment like that presented by the COVID-19 pandemic. Our level of reserves has allowed the Trustees to proceed with plans to recruit a CEO to help us diversify our income sources in the future.

Going Concern

2023 has echoed our financial progress in 2022 and has seen a return to normal and it has also been a financially successful year for Plant Heritage. Given this we consider our operations to be

sustainable and that there is an optimistic outlook with no material uncertainty. Whilst some of our key income streams, particularly legacy income, can be volatile, Plant Heritage has accumulated a level of reserves to be able to respond to a sudden downturn in revenue, but our recent financial stability has also allowed us to recruit a CEO, hopefully to further diversify and build future revenue.

The Charity has a healthy reserves position and has met its free reserves target and has also put aside designated funds to mitigate the risks of any similar sudden future change to the Charity's operating environment. The Charity also carefully manages its working capital position and maintains a healthy cash position.

The Trustees have also considered the Charity's plans including investment in Persephone 2.0 for 2023/4 and are of the view that the level of net current assets and liquid funds are sufficient to ensure future operations and that the Charity is a going concern.

Fundraising Activities

Donations and Sponsorships

Plant Heritage is indebted to its supporters, sponsors, and advertisers – we thank them all for their generous support and in particular:

Griffin Glasshouses
Johnsons Seeds
Burpee Europe Ltd
Melcourt Industries Ltd
Squires Garden Centres – 45th celebration border at RHS Hampton Court

Plant Heritage gratefully acknowledges grants and donations from the following charitable trusts and foundations, which help to support our core conservation work as well as the Threatened Plants Programme, National Collection Holder and membership workshops, the Plant Guardians scheme, our Persephone development work:

Goulburn Charitable Trust
Mrs A A Clutterbuck's Charitable Trust
PF Charitable Trust
Shanly Foundation - 45th sapphire celebration display at RHS Hampton
Sir Jeremiah Colman Gift Trust
Stanley Smith (UK) Horticultural Trust
The Hawthorne Charitable Trust

Plant Heritage also acknowledges donations from Collection Holder open days, whether individual open days or through the NGS, and all individual donations from Members, Friends, and supporters.

Income from legacies and in memoriam

We received income from 3 legacies this year, from members. We would like to express our gratitude to, Mary Rawitzer and Dr Alison Ross and S Roberts for helping us to save our cultivated plants for future generations. We wish to thank those that gave donations in memoriam too.

Corporate Members

We are grateful for the continued support of our Gold Corporate Members in 2022:

Barton Grange Garden Centre
Shanly Homes

We are also grateful for the continued support of our Bronze Corporate supporters:

Arboricultural Association	Capital Gardens Ltd
Bayntun Flowers	Crafty Plants
Broadband UK	Doddington Place Gardens
Broadband Providers	Floral Tours
Brother UK	Griffin Glasshouses
Canonteign Falls	J Dickinsons & Sons

Johnsons Seeds
Melcourt Industries Ltd
Olympian Garden Buildings
Path Energy
Plan-it Windows

The National Resource Consortium
Whatley Manor
Woottens of Wenhaston
XY Workwear

Transfers from Groups

We are very grateful for the generosity and creativity of our groups who continue to be focused on engaging with Plant Heritage members and raising funds for our work.

The charity recognises the commitment and hard work put in by the members of the area groups who fundraise throughout the year and generously pass these contributions on to support the core work of the charity. In all, Groups transferred £62,395 (2022: £61,867) to Central Office. Incoming resources of the Groups increased to £116,571 (2022: £104,599)

Plant Heritage is also grateful to its affiliated groups in Guernsey and Manx, and the Wiltshire Gardens Trust who provide financial support.

Structure, Governance and Management

Plant Heritage is a company limited by guarantee and is governed by its Memorandum and Articles of Association, adopted on 2 February 1988, amended in April 2004, April 2010 and July 2018

Directors and Trustees

The Board of Trustees are responsible for the overall governance of the charity. The Trustees are also the Directors of the Limited Company. Trustees are appointed by the membership at the Annual General Meeting (AGM). At each AGM, one-third of the directors must retire from office. The directors to retire by rotation must be those who have been longest in office since their last appointment. A director must retire after serving a total of eight years, consecutive or otherwise.

Mrs Cecilia Bufton	Chairman Appointed 5 th October 2017, re-appointed 4 th May 2019, reappointed 28 th April 2022
Mr James Muir Marshall	Vice-Chairman Appointed 18 April 2018, re-appointed 2 nd May 2020, reappointed 28 th April 2022
Mr Gareth Morgan	Treasurer Appointed 10 th July 2020, confirmed 17 th April 2021
Mrs Catherine Penny	Appointed 5 October 2017, re-appointed 2 nd May 2020, re-appointed 28 th April 2022
Mrs Emma Crawforth	Appointed 26 th July 2018, re-appointed 17 th April 2021
Mrs Sally Nex	Appointed 26 th July 2018, re-appointed 17 th April 2021
Ms Helen Triggs	Appointed 4 th May 2019, re-appointed 17 th April 2021 resigned 21 st February 2023
Ms Kavita Kapoor	Appointed 14 th September 2022
Mr Jonathan Sheppard	Appointed 13 th December 2022, resigned 4 January 2024

The Board met formally on four occasions to discuss the management of the charity.

Governance changes

Plant Heritage held its 2023 AGM virtually and plans to do so again in 2024. Members are able to vote either in person during the meeting, by mail (email or post) or by proxy.

Risk Management

Plant Heritage Trustees have considered the major risks to which the charity is exposed and review these at least annually through a documented risk register. Trustees are satisfied that established procedures are sufficient to manage and mitigate those risks.

Public benefit

Plant Heritage conserves cultivated plants. Trustees have paid due regard to the Charity Commission guidance on public benefit in deciding how to pursue our objectives. Our strategy details how we carry out our work and how we engage with the public.

Committees and Working Groups

Finance Committee (FC) <i>Meetings every two months</i> Responsible for finance • Helen Moorcraft (Chair) • Gareth Morgan • Cecilia Bufton	Conservation Committee (CC) <i>Meetings three times a year</i> Development of Conservation Strategy and delivery of associated programmes and activities • Jim Marshall (Chair) • Emma Crawforth (Vice Chair) • Simon Toomer • Tim Upson • Rosie Yeomans • Catrina Fenton • Paul Bartlett • Andrew Gaunt
Membership & Supporters Committee (MSC) <i>Meetings three times a year</i> Development of membership strategies and delivery of advice, support, and guidance to Groups • Catherine Penny (Chair) • Penny Ross • Rosemary Buisseret • Rhona Frayne	Plant Collections Committee (PCC) <i>Meetings four times a year</i> Accreditation of National Plant Collections • Tim Upson (Chair) • Jonathan Webster (Vice-Chairman) • Chris Clennett • Kevin Hobbs • Ross Kerby/Madeleine Tinson • Rosie Yeomans • Gary Firth • Matthew Biggs • Chris Trimmer • Chris Bird • Dawn Edwards
Persephone Working Group (PWG) <i>Meetings up to four times a year</i> • Doug Smith (Chair) • David Ross • Penny Ross • Barry Clarke • Gary Firth	
Governance & People Committee (GPC) Governance, compliance, processes, policies, and guidelines. Trustee appointments & HR issues <i>Meetings four times a year</i> • Margaret Headen • Jim Marshall	

Staffing

The headcount at the end of October 2023 was 4.91 full time posts. The Board of Trustees wish to thank all the members of staff for their expertise, loyalty, resourcefulness, and commitment to Saving Garden Plants.

Business Plan 2024

Conservation

1. Increase the number of cultivated plants conserved
2. Develop and maintain good standards of curation
3. Inform and engage others with our conservation work
4. Influence global thinking on issues related to plant conservation

Membership & Supporters

5. Grow the membership of Plant Heritage
6. Develop programmes to raise funds from supporters
7. Improve and expand internal communication channels

Finance & Fundraising

8. Oversee financial management
9. Develop a fundraising strategy to ensure Plant Heritage has sufficient income to achieve its charitable aims

Governance and People

10. Oversee the appointment of Trustees and the operation of committees and working groups
11. Ensure that Plant Heritage systems, processes and data management are maintained to a good standard
12. Advise on governance, appointments and operation of national office and local groups

External Communications

13. Inform and engage audiences with our work, with a view to increasing membership, donations and support by providing information across a wide range of media

Statement of Trustees' Responsibilities

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 surplus or deficit for that period. In preparing these financial statements, the Trustees have in their opinion:

- selected suitable accounting policies and then applied them consistently;
- made judgements and estimates that are reasonable and prudent;
- ensured that the applicable accounting standards have been followed; and
- prepared the financial statements on the going concern basis.

The Trustees have been responsible for keeping proper accounting records which disclose, with reasonable accuracy at any time, the financial position of the charity and which have enabled them to ensure that the financial statements comply with the Companies Act 2006. They have also been responsible for the safeguarding of the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Statement of Disclosure of Information to Independent Examiner

So far as the Trustees are aware, there is no relevant information of which the Charity's Independent Examiner has not been informed.

Approved by the Board of Trustees on 27 March 2024 and signed on their behalf by:



Trustee and Chairman
Mrs Cecilia Bufton



Trustee and Treasurer
Mr Gareth Morgan

PLANT HERITAGE

INDEPENDENT AUDITOR'S REPORT TO THE TRUSTEES OF PLANT HERITAGE

Opinion

We have audited the financial statements of Plant Heritage (the 'charity') for the year ended 31 October 2023 which comprise the statement of financial activities, the balance sheet and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 October 2023 and of its incoming resources and application of resources, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended).

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the *Auditor's responsibilities for the audit of the financial statements* section of our report. We are independent of the charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charity's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and we do not express any form of assurance conclusion thereon. Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit, or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

PLANT HERITAGE

INDEPENDENT AUDITOR'S REPORT (CONTINUED) TO THE TRUSTEES OF PLANT HERITAGE

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 and the Charities Accounts (Scotland) Regulations 2006 (as amended) require us to report to you if, in our opinion:

- the information given in the financial statements is inconsistent in any material respect with the trustees' report; or
- sufficient and proper accounting records have not been kept; or
- the financial statements are not in agreement with the accounting records; or
- we have not received all the information and explanations we require for our audit.

Responsibilities of trustees

As explained more fully in the statement of trustees' responsibilities, the trustees, who are also the directors of the charity for the purpose of company law, are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error. In preparing the financial statements, the trustees are responsible for assessing the charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

We have been appointed as auditor under section 144 of the Charities Act 2011 and section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and report in accordance with the Acts and relevant regulations made or having effect thereunder.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud, is detailed below.

We assessed the susceptibility of the company's financial statements to material misstatement, including obtaining an understanding of how fraud might occur, by:

-making enquiries of management as to where they considered there was susceptibility to fraud, their knowledge of actual, suspected and alleged fraud;

-considering the internal controls in place to mitigate risks of fraud and non-compliance with laws and regulations; and

-testing controls with walk through procedures and substantive transaction testing;

To address the risk of fraud through management bias and override of controls, we:

-performed analytical procedures to identify any unusual or unexpected relationships;

-tested journal entries to identify unusual transactions;

-assessed whether judgements and assumptions made in determining any accounting estimates were indicative of potential bias;

-investigated the rationale behind significant or unusual transactions; and

A further description of our responsibilities is available on the Financial Reporting Council's website at: <https://www.frc.org.uk/auditorsresponsibilities>. This description forms part of our auditor's report.

PLANT HERITAGE

INDEPENDENT AUDITOR'S REPORT (CONTINUED) TO THE TRUSTEES OF PLANT HERITAGE

Use of our report

This report is made solely to the charity's trustees, as a body, in accordance with part 4 of the Charities (Accounts and Reports) Regulations 2008 and regulation 10 of the Charities Accounts (Scotland) Regulations 2006. Our audit work has been undertaken so that we might state to the charity's trustees those matters we are required to state to them in an auditors' report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and the charity's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Frances Wilde FCCA DChA

**Chartered Certified Accountant
Senior Statutory Auditor**

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For and on behalf of
Warner Wilde
Chartered Certified Accountants
Statutory Auditors
4 Marigold Drive
Bisley
Surrey
GU24 9SF

Warner Wilde Limited is eligible for appointment as auditor of the charity by virtue of its eligibility for appointment as auditor of a company under section 1212 of the Companies Act 2006.

PLANT HERITAGE

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 OCTOBER 2023

Current financial year

		Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Restricted funds 2023 £	Total 2023 £	Total 2022 £
	Notes					
Income from:						
Donations and legacies	3	301,311	1,993	45,746	349,050	222,868
Charitable activities	4	147,348	106,893	-	254,241	254,109
Total other trading activities	5	15,804	7,177	-	22,981	19,162
Investments	6	12,335	508	-	12,843	2,050
Total income		476,798	116,571	45,746	639,115	498,189
Expenditure on:						
<u>Raising funds</u>						
Costs of generating donations and legacies	7	3,194	-	-	3,194	24,399
<u>Charitable activities</u>						
Membership and Shows	8	40,839	14,762	5,782	61,383	43,978
Educational Activities	8	82,303	69,294	3,000	154,597	126,367
Plant Conservation	8	191,117	1,662	40,291	233,070	198,032
Total charitable expenditure		314,259	85,718	49,073	449,050	368,377
Total resources expended		317,453	85,718	49,073	452,244	392,776
Gross transfers between funds		62,395	(62,395)	-	-	-
Net income/(expenditure) for the year/ Net movement in funds		221,740	(31,542)	(3,327)	186,871	105,413
Fund balances at 1 November 2022		370,043	267,532	27,404	664,979	559,566
Fund balances at 31 October 2023		591,783	235,990	24,077	851,850	664,979

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.

PLANT HERITAGE

STATEMENT OF FINANCIAL ACTIVITIES (CONTINUED) INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 OCTOBER 2023

Prior financial year

		Unrestricted funds general 2022 £	Unrestricted funds designated 2022 £	Restricted funds 2022 £	Total 2022 £
	Notes				
Income from:					
Donations and legacies	3	181,960	2,847	38,061	222,868
Charitable activities	4	161,131	92,978	-	254,109
Total other trading activities	5	10,454	8,708	-	19,162
Investments	6	1,984	66	-	2,050
Total income		355,529	104,599	38,061	498,189
Expenditure on:					
<u>Raising funds</u>					
Costs of generating donations and legacies	7	24,399	-	-	24,399
<u>Charitable activities</u>					
Membership and Shows	8	43,493	-	485	43,978
Educational Activities	8	63,593	58,451	4,323	126,367
Plant Conservation	8	160,458	1,040	36,534	198,032
Total charitable expenditure		267,544	59,491	41,342	368,377
Total resources expended		291,943	59,491	41,342	392,776
Net incoming/(outgoing) resources before transfers		63,586	45,108	(3,281)	105,413
Gross transfers between funds		61,867	(61,867)	-	-
Net income/(expenditure) for the year/ Net movement in funds		125,453	(16,759)	(3,281)	105,413
Fund balances at 1 November 2021		244,590	284,291	30,685	559,566
Fund balances at 31 October 2022		370,043	267,532	27,404	664,979

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.

PLANT HERITAGE

BALANCE SHEET

AS AT 31 OCTOBER 2023

	Notes	2023 £	£	2022 £	£
Fixed assets					
Intangible assets	13		79,610		90,848
Tangible assets	14		4,708		5,465
			<u>84,318</u>		<u>96,313</u>
Current assets					
Debtors	15	16,609		27,000	
Cash at bank and in hand		791,991		581,506	
		<u>808,600</u>		<u>608,506</u>	
Creditors: amounts falling due within one year	16	(35,105)		(33,848)	
		<u></u>		<u></u>	
Net current assets			773,495		574,658
Total assets less current liabilities			857,813		670,971
Creditors: amounts falling due after more than one year					
Deferred income	17	5,963		5,992	
		<u></u>	(5,963)	<u></u>	(5,992)
Net assets			<u>851,850</u>		<u>664,979</u>
Income funds					
Restricted funds	19		24,077		27,404
<u>Unrestricted funds</u>					
Designated funds	20	235,990		267,532	
General unrestricted funds		591,783		370,043	
		<u></u>	<u>827,773</u>	<u></u>	<u>637,575</u>
			<u>851,850</u>		<u>664,979</u>

PLANT HERITAGE

BALANCE SHEET (CONTINUED)

AS AT 31 OCTOBER 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 October 2023, although an audit has been carried out under section 144 of the Charities Act 2011.

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 under the requirements of the Companies Act 2006, 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 27 March 2024



Mr G Morgan
Trustee

Company registration number 2222953

PLANT HERITAGE

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

1 Accounting policies

Charity information

Plant Heritage is a private company limited by guarantee incorporated in England and Wales. The registered office is First floor offices, Stone Pine House, Wisley, Woking, Surrey, GU23 6QD.

1.1 Accounting convention

The financial statements have been prepared in accordance with the charity's governing document, the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) 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)". 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 applying FRS 102 Update Bulletin 1 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, [modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value]. 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.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

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.

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.

PLANT HERITAGE

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

1 Accounting policies

(Continued)

1.5 Expenditure

A liability is recognised when either a constructive or legal obligation is identified. Central costs are apportioned between costs of generating funds and charitable activities on the basis of the specific activities of members of staff. Irrecoverable VAT is allocated to the same expenditure heading as the cost to which it relates. Basic financial liabilities are recognised at transaction cost.

1.6 Intangible fixed assets other than goodwill

Intangible assets acquired separately from a business are recognised at cost and are subsequently measured at cost less accumulated amortisation and accumulated impairment losses.

Intangible assets acquired on business combinations are recognised separately from goodwill at the acquisition date where it is probable that the expected future economic benefits that are attributable to the asset will flow to the entity and the fair value of the asset can be measured reliably; the intangible asset arises from contractual or other legal rights; and the intangible asset is separable from the entity.

Amortisation 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:

Website	8 Years Straight Line
Persephone intangibles	4 years straight line

1.7 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:

Plant and machinery	4 Years Straight Line
Computers	4 Years 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.

1.8 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

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.

PLANT HERITAGE

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

1 Accounting policies

(Continued)

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.

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.11 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

1.12 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

PLANT HERITAGE

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

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2023

3 Donations and legacies

	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Restricted funds 2023 £	Total 2023 £	Unrestricted funds general 2022 £	Unrestricted funds designated 2022 £	Restricted funds 2022 £	Total 2022 £
Donations and gifts	48,005	1,993	6,333	56,331	21,274	2,847	9,000	33,121
Legacies receivable	250,581	-	-	250,581	160,686	-	-	160,686
Grants	2,725	-	39,413	42,138	-	-	29,061	29,061
	<u>301,311</u>	<u>1,993</u>	<u>45,746</u>	<u>349,050</u>	<u>181,960</u>	<u>2,847</u>	<u>38,061</u>	<u>222,868</u>

PLANT HERITAGE

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

4 Charitable activities

	Membership and Shows	Educational Meetings and Events held by Area Groups	Total 2023	Membership and Shows	Educational Meetings and Events held by Area Groups	Total 2022
	2023	2023		2022	2022	
	£	£	£	£	£	£
Sales within charitable activities	141,810	112,431	254,241	152,692	101,417	254,109
Analysis by fund						
Unrestricted funds - general	141,810	5,538	147,348	152,692	8,439	161,131
Unrestricted funds - designated	-	106,893	106,893	-	92,978	92,978
	141,810	112,431	254,241	152,692	101,417	254,109

5 Total other trading activities

	Unrestricted funds general	Unrestricted funds designated	Total	Unrestricted funds general	Unrestricted funds designated	Total
	2023	2023	2023	2022	2022	2022
	£	£	£	£	£	£
Advertising, publications, sponsorship and trading	15,804	-	15,804	10,454	-	10,454
Fundraising events	-	7,177	7,177	-	8,708	8,708
Total other trading activities	15,804	7,177	22,981	10,454	8,708	19,162

6 Investments

	Unrestricted funds general	Unrestricted funds designated	Total	Unrestricted funds general	Unrestricted funds designated	Total
	2023	2023	2023	2022	2022	2022
	£	£	£	£	£	£
Interest receivable	12,335	508	12,843	1,984	66	2,050

PLANT HERITAGE

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

7 Raising funds

	Unrestricted funds general 2023 £	Unrestricted funds general 2022 £
Costs of generating donations and legacies		
Staging fundraising events	731	2,752
Staff costs	-	12,055
Depreciation and impairment	625	2,459
Support costs	1,838	7,133
Costs of generating donations and legacies	3,194	24,399
	3,194	24,399

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2023

8 Charitable activities

	Membership and Shows 2023 £	Educational Activities 2023 £	Plant Conservation 2023 £	Total 2023 £	Membership and Shows 2022 £	Educational Activities 2022 £	Plant Conservation 2022 £	Total 2022 £
Staff costs	23,530	23,495	102,650	149,675	20,618	20,618	98,159	139,395
Depreciation and impairment	5,248	5,248	22,930	33,426	4,235	4,235	16,395	24,865
Other charitable expenditure	15,726	108,759	32,254	156,739	6,140	87,399	32,177	125,716
	<u>44,504</u>	<u>137,502</u>	<u>157,834</u>	<u>339,840</u>	<u>30,993</u>	<u>112,252</u>	<u>146,731</u>	<u>289,976</u>
Grant funding of activities (see note 9)	-	216	1,662	1,878	-	1,035	1,040	2,075
Share of support costs (see note 10)	15,421	15,421	67,376	98,218	12,190	12,285	47,555	72,030
Share of governance costs (see note 10)	1,458	1,458	6,198	9,114	795	795	2,706	4,296
	<u>61,383</u>	<u>154,597</u>	<u>233,070</u>	<u>449,050</u>	<u>43,978</u>	<u>126,367</u>	<u>198,032</u>	<u>368,377</u>
Analysis by fund								
Unrestricted funds - general	40,839	82,303	191,117	314,259	43,493	63,593	160,458	267,544
Unrestricted funds - designated	14,762	69,294	1,662	85,718	-	58,451	1,040	59,491
Restricted funds	5,782	3,000	40,291	49,073	485	4,323	36,534	41,342
	<u>61,383</u>	<u>154,597</u>	<u>233,070</u>	<u>449,050</u>	<u>43,978</u>	<u>126,367</u>	<u>198,032</u>	<u>368,377</u>

PLANT HERITAGE

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

9 Grants payable

	Educational Activities 2023 £	Plant Conservation 2023 £	Total 2023 £	Educational Activities 2022 £	Plant Conservation 2022 £	Total 2022 £
Grants to institutions:						
Other	-	1,662	1,662	-	1,040	1,040
Grants to individuals	216	-	216	1,035	-	1,035
	<u>216</u>	<u>1,662</u>	<u>1,878</u>	<u>1,035</u>	<u>1,040</u>	<u>2,075</u>

10 Support costs

	Support costs £	Governance costs £	2023 £	Support costs £	Governance costs £	2022 £
Staff costs	27,033	-	27,033	24,651	-	24,651
Office running costs	73,023	-	73,023	54,513	-	54,513
Independent Examination and Accounts Preparation	-	7,914	7,914	-	3,948	3,948
Other governance costs including meetings and travelling	-	1,200	1,200	-	348	348
	<u>100,056</u>	<u>9,114</u>	<u>109,170</u>	<u>79,164</u>	<u>4,296</u>	<u>83,460</u>
Analysed between						
Fundraising	1,838	-	1,838	7,133	-	7,133
Charitable activities	98,218	9,114	107,332	72,030	4,296	76,326
	<u>100,056</u>	<u>9,114</u>	<u>109,170</u>	<u>79,163</u>	<u>4,296</u>	<u>83,459</u>

11 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year.

None of the trustees (2022: none) incurred reimbursed expenses.

PLANT HERITAGE

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

12 Employees

The average monthly number of employees during the year was:

	2023 Number	2022 Number
Fundraising	-	1
Plant Conservation	4	4
Membership	1	1
Finance and admin	1	1
Total	6	7

Employment costs	2023 £	2022 £
Wages and salaries	161,318	160,211
Social security costs	7,341	7,921
Other pension costs	8,049	7,969
	176,708	176,101

8 (2022: 9) part time employees equate to 6 (2022: 7) full time staff.

Key management personnel comprises the Business Manager and Conservation Manager roles. The total remuneration for Key Management Personnel in the year, including employer's pension and nation insurance contributions, was £56,482.

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

13 Intangible fixed assets

	Website £	Persephone intangibles £	Total £
Cost			
At 1 November 2022	59,338	78,278	137,616
Additions - internally developed	-	18,868	18,868
At 31 October 2023	59,338	97,146	156,484
Amortisation and impairment			
At 1 November 2022	25,446	21,321	46,767
Amortisation charged for the year	7,417	22,690	30,107
At 31 October 2023	32,863	44,011	76,874
Carrying amount			
At 31 October 2023	26,475	53,135	79,610
At 31 October 2022	33,891	56,957	90,848

PLANT HERITAGE

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

14 Tangible fixed assets

	Plant and machinery	Computers	Total
	£	£	£
Cost			
At 1 November 2022	659	14,662	15,321
Additions	2,250	938	3,188
	<u>2,909</u>	<u>15,600</u>	<u>18,509</u>
At 31 October 2023			
Depreciation and impairment			
At 1 November 2022	236	9,620	9,856
Depreciation charged in the year	508	3,437	3,945
	<u>744</u>	<u>13,057</u>	<u>13,801</u>
At 31 October 2023			
Carrying amount			
At 31 October 2023	<u>2,165</u>	<u>2,543</u>	<u>4,708</u>
At 31 October 2022	<u>423</u>	<u>5,042</u>	<u>5,465</u>

15 Debtors

	2023	2022
	£	£
Amounts falling due within one year:		
Trade debtors	5,870	6,352
Other debtors	7,380	14,899
Prepayments and accrued income	3,359	5,749
	<u>16,609</u>	<u>27,000</u>

16 Creditors: amounts falling due within one year

	Notes	2023	2022
		£	£
Other taxation and social security		-	3,564
Deferred income	17	17,447	22,339
Trade creditors		7,548	1,039
Other creditors		36	149
Accruals		10,074	6,757
		<u>35,105</u>	<u>33,848</u>

PLANT HERITAGE

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

17 Deferred income

	2023 £	2022 £
Other deferred income	23,410	28,331
Deferred income is included in the financial statements as follows:		
	2023 £	2022 £
Deferred income is included within:		
Current liabilities	17,447	22,339
Non-current liabilities	5,963	5,992
	23,410	28,331
Movements in the year:		
Deferred income at 1 November 2022	28,331	22,173
Released from previous periods	(28,331)	(6,613)
Resources deferred in the year	23,410	12,771
Deferred income at 31 October 2023	23,410	28,331

18 Retirement benefit schemes

Defined contribution schemes

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently administered fund.

The charge to profit or loss in respect of defined contribution schemes was £8,049 (2022: £7,969).

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2023

19 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 November 2021	Incoming Resources	Resources Expended	Balance at 1 November 2022	Incoming Resources	Resources Expended	Balance at 31 October 2023
	£	£	£	£	£	£	£
Esmee Fairbairn	21,899	-	(21,899)	-	-	-	-
Shanly Foundation	-	-	-	-	2,500	(2,500)	-
Stanley Smith Horticultural Trust	-	-	-	-	3,800	(3,800)	-
Heritage Lottery	-	29,061	(18,109)	10,952	39,413	(38,776)	11,589
Tanner Trust	-	2,000	(1,093)	907	-	(907)	-
Heather Society	6,500	-	-	6,500	-	-	6,500
Persephone	1,286	7,000	(241)	8,045	33	(2,090)	5,988
West Midlands Shows Fund	1,000	-	-	1,000	-	(1,000)	-
	<u>30,685</u>	<u>38,061</u>	<u>(41,342)</u>	<u>27,404</u>	<u>45,746</u>	<u>(49,073)</u>	<u>24,077</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2023

19 Restricted funds

(Continued)

Tanner Trust - Funding for JSTOR licences.

Esmee Fairbairn - Funding for a Conservation Manager.

Persephone - Funding for the development and operation of an online horticultural database developed for recording plants in collections.

Heritage Lottery - Funding for a Digital Volunteer Officer, saving and sharing digital plant heritage.

West Midland Shows - Held to be used for a show display.

Heather Society - For the advancement of horticulture, in particular conservation, improvement and research into the growing of heaths, heathers and allied plants.

The Stanley Smith Horticultural Trust - Funding for the national collection holders' conference and 45th Sapphire celebration event.

Shanly Foundation - Funding for a display garden at the RHS Hampton Court Flower Show.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2023

20 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:

	Movement in funds					Movement in funds			
	Balance at 1 November 2021	Incoming Resources	Resources Expended	Transfers	Balance at 1 November 2022	Incoming Resources	Resources Expended	Transfers	Balance at 31 October 2023
	£	£	£	£	£	£	£	£	£
Area Groups	179,291	104,599	(59,491)	(61,867)	162,532	116,571	(70,956)	(62,395)	145,752
Office Move	15,000	-	-	-	15,000	-	(13,135)	-	1,865
CRM	30,000	-	-	-	30,000	-	(1,627)	-	28,373
Risk Reserve	60,000	-	-	-	60,000	-	-	-	60,000
	<u>284,291</u>	<u>104,599</u>	<u>(59,491)</u>	<u>(61,867)</u>	<u>267,532</u>	<u>116,571</u>	<u>(85,718)</u>	<u>(62,395)</u>	<u>235,990</u>

Area Groups

Area Groups carry out activities throughout the year in accordance with the charity's objectives whilst remaining sympathetic and relevant to each group as defined by its members and geographical location. The Designated Fund represents the income and expenditure from group activities and the value retained in bank accounts as at the period end.

Project Fund

The Project Fund provides for spending on specific projects planned for the short to medium term.

Office Move

To fund the relocation costs associated with changing office.

CRM

To fund a new customer relationship management system.

Risk Reserve

For future operational shocks such as COVID.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2023

21 Analysis of net assets between funds

	National Office	Area Groups and Project Fund	Restricted Funds	Total	National Office	Area Groups and Project Fund	Restricted Funds	Total
	2023	2023	2023	2023	2022	2022	2022	2022
	£	£	£	£	£	£	£	£
Fund balances at 31 October 2023 are represented by:								
Intangible fixed assets	77,984	-	1,626	79,610	90,848	-	-	90,848
Tangible assets	4,708	-	-	4,708	5,465	-	-	5,465
Current assets/(liabilities)	515,054	235,990	22,451	773,495	279,722	267,532	27,404	574,658
Long term liabilities	(5,963)	-	-	(5,963)	(5,992)	-	-	(5,992)
	<u>591,783</u>	<u>235,990</u>	<u>24,077</u>	<u>851,850</u>	<u>370,043</u>	<u>267,532</u>	<u>27,404</u>	<u>664,979</u>

PLANT HERITAGE

England & Wales - Charity number 1004009

Accounts



Report of the Trustees and Unaudited Financial Statements
for the Year ended 31 October 2022

Registered Charity No: 1004009/SC041785
Company Registered No 2222953

Patron The former Prince of Wales

President Alan Titchmarsh

Vice-Presidents

Lawrence Banks

Christopher Brickell

Jamie Compton

Lady Hamilton

Roy Lancaster

Sir Roy Strong

Trustees

Mrs C Bufton (Chairman)

Mr J Marshall (Vice Chairman)

Mr G Morgan (Treasurer)

Mrs C Penny

Mrs E Crawforth

Mrs S Nex

Ms E Fontaine (resigned Feb 2022)

Ms H Triggs (resigned Feb 2023)

Mr A Stones (resigned Dec 2022)

Ms P Bracken (resigned Sept 2022)

Mrs M Lloyd (resigned Dec 2022)

Ms K Kapoor (joined Sept 2022)

Mr J Sheppard (joined Dec 2022)

Charity Number 1004009/SC041785

Company Number 2222953

Independent Examiner Frances Wilde FCCA DChA
Warner Wilde
Chartered Certified Accountants 4
Marigold Drive
Bisley
Surrey
GU24 9SF

Plant Heritage office
First Floor Offices, Stone Pine House, Wisley Woking, Surrey, GU23 6QD
www.plantheritage.org.uk

		Page
	Patron, Presidents and Trustees of the Charity*	2
	Annual General Meeting 2023*	4
	Chairman's Review*	5-7
	Activities in 2021/22: What Plant Heritage does*	
	Objectives and Achievements*	8-19
	Treasurer's Financial Review*	20-21
	Fundraising Activities*	22-23
	Structure, Governance and Management*	24-26
	Statement of Trustees' Responsibilities	27
	Report of the Independent Examiner	28
	Statement of Financial Activities	29-30
	Balance Sheet	31-32
	Notes to the Financial Statements	33-48
	*These sections form part of the Trustee's Annual Report	

Annual General Meeting 2023

All members of Plant Heritage have been invited to meet members of the Board (who are Trustees of Plant Heritage) and ask questions on past performance and future plans at the 2023 Annual General Meeting which will be a virtual event on Thursday the 27th April.

Questions about anything contained in this report or the accompanying Financial Statements, should be addressed to the Chairman, by email chairman@plantheritage.org.uk or if that is not possible, by mail Plant Heritage, First Floor Offices, Stone Pine House, Wisley Woking, Surrey, GU23 6QD, or telephone 01483 447540.

Chairman's Review

Conserving the diversity of cultivated plants is essential to all our futures. The plants grown in National Plant Collections® or held by Plant Guardians® contain unique combinations of genetic material which are the legacy of generations of plant collectors and breeders who have built our nation's rich and unique horticultural landscape. The work of Plant Heritage spans four decades and in the light of climate change and an increasingly urban society, which values horticulture as important to its health and well-being, the charity's work is as important now as it was in the 1970s, when the charity's founders identified that a significant part of the nation's rich horticultural heritage was at risk of disappearing.

Our work is spearheaded by a network of National Collection Holders who come from all walks of life and live across the length and breadth of the British Isles. The beauty of the National Plant Collections is that anyone who has an interest, passion or expertise in a certain group of plants, whether amateur or professional can potentially become a collection holder. In doing so they curate and cultivate their own living collection which then forms part of the largest living collection of garden plants held outside botanical institutions in the UK.

Our National Collection Holders are supported by a dedicated Central Office team including three Plant Conservation specialists who provide technical support across the British Isles. This network is strengthened by our regional network of volunteer Collection Coordinators who regularly visit Collection Holders whilst also seeking out new and potential collections. All applications are then guided through the process by the Plant Conservation Committee. Members of this committee are independent advisers, experts in taxonomy, horticulture, botany and the horticultural trade and area group representatives, all volunteers who freely give their time to ensure National Plant Collections are maintained and looked after to a consistent standard.

The Threatened Plants Programme underpins our conservation work and is an ongoing research initiative which identifies plants threatened and worthy of conserving. The Plant Guardian® scheme encourages members to actively seek out and conserve individual plants. Plant Heritage's education objective is delivered by both our regional groups and the Central Office through a diverse range of events, shows, publications, workshops and other activities. Many of these continue to be delivered virtually. As a charity, Plant Heritage is funded through membership subscriptions, donations from individuals and industry, sponsorship and donations from charitable trusts.

What are the threats to our garden plants?

Changing fashions

Changes in styles of planting and taste can cause groups of plants to go out of fashion. We don't want to lose the range of cultivars available for when they inevitably come back into fashion.

Changes to the plant sales trade

The requirement for plants to be of a specific size and in flower at the point of sale by garden centres and supermarkets can lead to a diminution of the range of plants grown in our gardens. We are also losing specialist plant nurseries who carry a much wider range of plants.

Climate change

Climate change over time will have a continuing effect on the range of cultivated plants available to the UK.

Pests and pathogens

Due to the nature of modern trade and travel there is an increasing risk of new pests and diseases being introduced to the UK. Recent examples of these include box blight, ash dieback, and agapanthus gall midge.

Loss of propagation or cultivation skills

A lack of horticultural skills, particularly in propagation, is causing a loss in the availability of specialist cultivated plants.

I am delighted to report that things did get back to near normal for Plant Heritage in 2021/22, with another bumper crop of National Collections awarded and a real step change in our plant record keeping, thanks to the development work done by the Persephone Working Group and the new digital volunteers gained through the project supported by the National Lottery Heritage Fund. Groups were also able to run more fundraising events and plant fairs and the team excelled themselves at the RHS Chelsea Flower Show. We also ended the year with a strong bank balance. Our plans to temporarily add to our reserves to protect the charity from a future “pandemic” situation, has resulted in a higher than usual reserve. Trustees will decide whether we need to hold that over for another year or whether it can be put towards our conservation plans. Our income was also very much supported by legacy donations. We thank all who leave us a gift in their will, their generosity enables us to protect the nation’s legacy of cultivated plants.

The Plant Heritage Conservation Committee reviewed the Conservation Strategy and produced a leaflet, sent to all Members as well as published on our website. This work aims to ensure our strategy is fit for the coming years and the leaflet provided examples that bring to life, the importance of the conservation work that Members and Supporters are helping to fund.

As mentioned, the team triumphed at RHS Chelsea Flower Show 2022, winning both a coveted RHS Gold Medal and being awarded the prestigious Best Discovery Exhibit in the Floral Marquee, for the overall design and aesthetics of the stand, the top-quality plants on display and in recognition of the huge team effort required to bring together four National Plant Collections. The exhibit celebrated the ongoing research by Collection Holders and highlighted that not all plants have a dedicated National Plant Collection, encouraging visitors to consider starting one.

Thanks to a generous grant from the National Lottery Heritage Fund’s “Digital Skills for Heritage” initiative, we have been able to accelerate our plans for ensuring that all National Plant Collection records are securely digitised. The grant allowed us to recruit a team of volunteers to help to transfer, maintain, and safeguard valuable information on our Persephone plant record system.

Trustees would like to thank our Digital Volunteer Officer and all of our Digital Plant Conservation Volunteers, who are working remotely, developing digital skills, and gaining experience working with plant records, research and plant profiles, whilst discovering more about our conservation schemes. Transferring information onto our online plant recording system helps safeguard this important data including details such as plant names, history or origins, cultivation, and photographs. Storing this information properly is as important as our hands-on conservation work, as it will ensure comprehensive plant records are kept safe for the future.

As we celebrate the accession of a new monarch, I am happy to assure members that Plant Heritage sent a letter to our Patron, His Majesty King Charles III, expressing our condolences on the death of Her Majesty Queen Elizabeth II. Our letter was acknowledged with thanks.

As I hope everyone knows by now, 2023 is 45 years since the start of the Plant Heritage journey and we have some great events planned, including a 45th year anniversary get-together at RHS Wisley, on Wednesday 27th September 2023. So much of the world has changed over these years, what has been steadfast is our shared passion for a rich diversity of cultivated plants, cared for by our National Plant Collection holders and Plant Guardians.

Inspiring more people to support our work is essential for our continued operation. As a national charity, funded through membership subscriptions, donations, legacies, sponsorships and fundraising events such

as plant fairs, we are keen to support our Groups and members in generating funds and we have decided to offer a new “Young Persons” membership. The new membership level is open to everyone under 30. Our aim is to engage with this generation, to give them the opportunity of learning how and why they should be conserving cultivated plants for their future.

I’m delighted that we will be publishing a full *Directory of National Plant Collections* for 2023 and that it will contain details of the almost 700 National Plant Collections. We are also planning to continue the webinars, open to all members over the winter months.

There were two resignations and one addition from the Board in this financial year, Kavita Kapoor who will be confirmed at the April 2023 AGM alongside Jonathan Sheppard who was co-opted to the Board in December 2022.

Our Mission is to conserve the rich diversity of cultivated plants in the UK and Ireland but this would not be possible without the commitment of our staff, members, National Collection Holders, Groups and all who volunteer their time and expertise to support and spread the word of our essential work. I would like to record the collective thanks to you all, from the Board of Trustees.

Cecilia Bufton

Chairman

Date 11th March 2023

Trustees Report – Objectives and Achievements

The Board, who are the Trustees of Plant Heritage (“the Charity”), present their annual report for the year ended 31 October 2022, prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity’s governing document, the small companies regime s419(2) Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) and “Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)”

Objectives:

Plant Heritage’s charitable purposes seek to

- promote the conservation of cultivated plants with a focus on endangered or rare garden plants
- encourage and carry out research into the cultivation of rare or endangered plants and related information
- encourage the education of the public in horticultural skills, particularly with regards to cultivated plant conservation
- encourage the introduction and the propagation of rare, cultivated plants not represented in the UK, within the law

We aim to do this by:

- Conserving our horticultural heritage by keeping living examples of plants in the **National Plant Collections**[®] scheme which enables us to coordinate collections, ranging from cultivated and species, to historical, heritage and scientific
- Identifying cultivars at the highest risk of extinction, with the ambition that these can be conserved. We do this through our **Threatened Plants Programme**[™]
- Encouraging individuals to conserve individual plants in the **Plant Guardian**[®] scheme, a register of holders of rare and unusual plants
- Sharing rare plants with gardeners across the UK, through our annual **Plant Exchange**[™]
- Documenting and recording collections of rare plants. This is done by our National Collection Holders and Plant Guardians and in our publications such as the *Directory*, *The Journal*, and through our online plant recording database **Persephone**
- Increasing the variety of garden plants available for gardens in the UK through supporting and undertaking group propagation activities and plant sales
- Ensuring rare plants and collections are supported in perpetuity (for future generations)
- Supporting Plant Guardians and National Collection Holders in their conservation work
- Educating the public in the importance of our work
- Working in partnership with organisations that can support our objectives
- Raising **funds** to support this work

Achievements:

Our Conservation Work

Plants growing in gardens might seem safer than those in the wild, but they can easily be lost forever if nobody is looking after them. Plant Heritage is the only organisation with the aim of conserving garden plants across the British Isles and Ireland.

Our cultivated flora is incredibly rich, resulting from development and care over centuries by dedicated gardeners. The heritage contained in these living organisms can only be preserved by active gardeners in living collections. These plants are a valuable historical and future resource, whether for their beauty, or having edible, medicinal or other useful properties. Each has a unique genetic code making it impossible to replace if lost. Conservation of a diverse range of plants underpins our resilience to a changing world, while meeting challenges such as climate change, pests and diseases and biodiversity loss.

Our conservation work is carried out in line with a five-year strategy that helps us to keep to the highest conservation standards and is delivered through working with National Plant Collection® holders, our volunteers and supporters.

Our conservation strategy aims to:

1. increase the number of cultivated plants conserved
2. develop and maintain good standards of curation
3. inform and engage others with our conservation work
4. influence global thinking on issues around plant conservation

Why do we do it?

Plants have always been selected and bred, whether for their beauty, flavour, scent or other reasons. This breeding involves an enormity of human effort and inventiveness that is wasted if the plants cease to be grown.

Climate change, the advance of new pests and diseases, loss of gardens, a diminishing nursery trade and lack of knowledge in the general population all conspire to reduce the diversity of our garden flora. If garden plants go, a tantalising slice of social, cultural and horticultural history dies with them.

We believe that cultivated plants deserve to be a target for conservation. Each one contains a unique combination of genetic material and is testament to human effort and inventiveness.

How do we do it?

Objective 1: Increase the number of cultivated plants actively conserved by Plant Heritage across the British Isles and Ireland

National Plant Collections®

National Plant Collections are held by individuals or organisations who undertake to document, develop and conserve a comprehensive collection of plants within a defined scope and hold them in trust for the

future. The scope can be defined botanically by plant group, either taxonomically, such as all the *Penstemon* cultivars or *Rhododendron* subsect. *Falconera*; or have a shared history such as plants collected by Harold Comber; or a geographic link, such as North West English apple cultivars.

National Plant Collections are made available for people to view, either by appointment, on special open days or as part of a garden open to the public. They contain about 95,000 plants, held across the 700 collections. Together this represents a huge resource for gardeners, nurserymen, garden designers, researchers, plant breeders and those interested in historical gardens and landscapes. Having these plants part of a registered conservation scheme ensures that they will be a resource for generations to come.

National Plant Collections are valuable for assessing the best cultivars for gardeners to enjoy and are used for scientific research, as a source of live plants and genetic material available for investigating a group of plants. They also provide insurance, being “living libraries” of the genetic diversity of garden plants. There are still some important groups of garden plants that are not represented in National Collections.

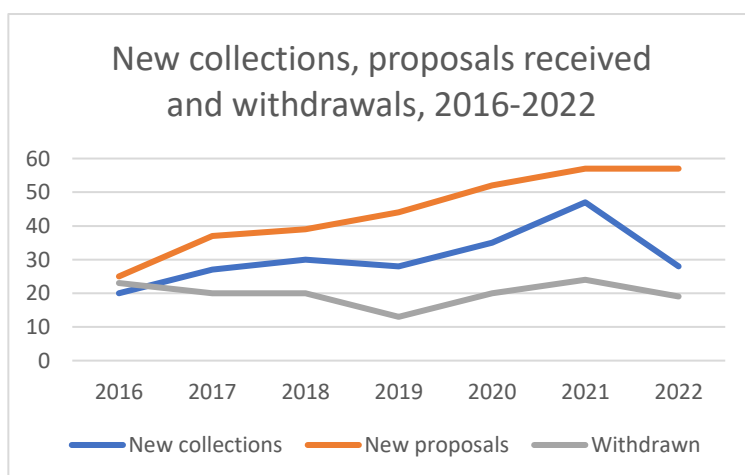
Plant Heritage supports collectors, helping them to tend, monitor and share their collection, guaranteeing the preservation of our garden flora. Members of our Groups all over the country, work together propagating plants and running plant exchanges and sales for funding. The groups also provide collection co-ordinators to advise the collectors and assess the collections.

The National Plant Collections scheme is overseen by the Plant Collections Committee, a sub-committee of the Board, whose members are independent advisers, experts in taxonomy, horticulture, botany and the horticultural trade and area group volunteers. The committee rigorously assesses new applications for scope and coverage.

After the November PCC, there are now 700 NPCs of which 331 are Horticultural, 285 Reference and 81 Historic collections, with 19 having been awarded Scientific status. In 2022 we accredited 28 new NPCs (47 in 2021). There had been a high number of proposals received through 2020/2021, but many were required to spend a year or two to build their collection, before accreditation. It is to be expected that these will be accredited in the next year or so.

There were 57 new proposals submitted in 2021, this is sustaining the already elevated numbers we were seeing through the pandemic, so it is positive to see a continued interest in people wanting to start NPCs. 19 collections are withdrawing (24 in 2021), six of which are handing on plants to another collection though not all may come back as NPCs.

Another is likely to be dispersed among a local group and one has been widely shared within a plant society. Two collections accredited this year are previously withdrawn collections that have been passed to a new holder. There are 3 new Dispersed collections. One is completely new and held across 3 sites including Birmingham Botanical



Garden. The other two are existing collections which have dispersed themselves with one other site to help secure the longevity of the collections.

Threatened Plants Programme

The Threatened Plants Programme (TPP) tracks the locations and availability of garden cultivars and works out how rare or threatened they are. Information from the Threatened Plants Programme helps collection holders prioritise their sourcing and propagation.

Plant Guardians can now see if a plant has been assessed as Threatened by the TPP, by looking at the records in Persephone. This can be updated annually after the latest Plant Finder update. There are 580 Threatened taxa (782 plants) highlighted through this. We are in the middle of work to get this section of the database live on the website as part of the NLHF project - this will be a first step in publishing threat status of cultivars.

We received 2022 Plant Finder data in July which has been integrated and have just received 2021 data (for the year without a printed book) which is in progress.

Thirteen Threatened Plants reports have been written for collections accredited this year.

Plant Guardians®

To preserve plants, it is essential that we keep them growing in gardens. Plant Heritage encourages members to take active part in conservation work by becoming a Plant Guardian. Through the scheme, rare plants are grown in multiple locations as an insurance against loss. Plant Heritage retains a record of plants in guardianship and encourages Plant Guardians to propagate the plants they are caring for and share them with other members via plant sales and the Plant Exchange

Since January 2022 we have had 596 plants recorded in the scheme, almost double the number from 2021. This has included some longer lists from keen new members to the scheme.

300 plants were withdrawn from the scheme – largely due to members not renewing their membership, or the plants becoming part of an NPC. There are currently 2,114 plants registered by 170 plant guardians. 44 have had a log-in to the new PG system on Persephone.

The yellow labels added to PG eligible plants at the Plant Exchange seems to have generated a few new people to the scheme. Encouraging the use of these labels at other PH events such as plant fairs would be a good opportunity to raise the profile of plant guardianship.

Plant Exchange 2023

The best way to conserve rare plants is to propagate and share them. The Plant Exchange enables hard to find plants being cultivated and conserved by members around the country to be shared with other members. By distributing plants around the country, we can re-establish plants in danger of being lost and give members the chance to get hold of something rare or unusual. We encourage members to propagate these plants and pass them on, to help secure their future.

In 2022, the Plant Exchange was held as part of a member's day at Renishaw Hall, in April. 18 groups (c72 individuals) took part, with 782 plants being offered. The number of plants offered and groups

participating was fewer than last year (23 groups and 1040 plants). With the reduction in number of active local groups we have taken steps to ensure members not represented by a local group/Plant Exchange coordinator can still participate. With this in mind, we have refreshed this page on the website with the aim of making the process clearer and encouraging more people to take part. We await the lists from the various areas for the 2023 exchange.

Objective 2: Develop and maintain good standards of curation for all plants held in our conservation schemes

Coordinators

This year two coordinators have stood down and one has joined. We have vacancies for Herts & Beds, Essex, East Midlands and Herefordshire. London and West Midlands are being temporarily covered by neighbouring counties. An article celebrating and extolling the joys of being a local coordinator went into the most recent Journal.

Persephone Utilisation

It is important that we record the information gathered by National Collection Holders to create an enduring resource for the future. The use of the Persephone online recording system, which is the preferred method for recording the National Plant Collections, continued to grow and we now have 293 full National Plant Collections with records on the system covering nearly 55,000 accessions along with 75 Proposals (at various stages) and some Withdrawn (legacy) collections and Garden Collections. A further 19 full National Collections are expected to provide data shortly and their collections have been set up on Persephone in readiness. This will bring us to over 300 National Plant Collections recorded on Persephone.

A Persephone e-newsletter has recently been circulated and regular technical updates are circulated to users. A News Item about Persephone 2.0 appeared in the December issue of the RHS Plant Review.

The Persephone team has continued to offer Zoom support and training on a regular basis. Four face-to-face workshops (two basic and two advanced) were run at the National Collection Holders Conference at Chester Zoo. A further four workshops are planned for 2023, in Yorkshire, Devon, Worcestershire and Sussex.

The Board would like to record its thanks to the whole working group for the hours they continue to give towards this project

Persephone 2.0 Development

A number of developments have been completed in the last 12 months, including a facility to expand the size of maps on a tablet, allowing users to update accession locations in the field. There is also the facility to export data to Google Earth so that we can produce maps with plant names on location.

Work to make key data about the Plant Guardians plants visible on the Plant Heritage website is ongoing and a new Conservation module has been developed to allow users to check and record the threat status of plant species in their collections, using the IUCN Red List.

Due to interest from existing users in using Persephone to record their whole garden, not just their collection, a pilot project was undertaken to understand what would be involved in making the system available via a paid subscription. Initial feedback was positive.

Persephone for Subscribers

Work to establish a subscription model for Persephone has continued with a number of large gardens starting to use the system.

National Lottery Heritage Fund (NLHF)

The NLHF project started in June this year and has resulted in a very large response to our call for volunteers with 21 recruited and 5 additional contacts advised that they will be contacted if space becomes available. These have all received training and are starting work on uploading plant lists from Collections with the aim of getting as many as possible onto Persephone. They are not working directly with collections, but with the volunteer manager as the conduit. Four more face to face workshops are planned.

Objective 3: Influence and guide future work in the field of conservation of cultivated plants

Collection Holder's conference

Collection Holder conference was held in November with 83 attendees, 53 of whom represented 90 collections and 19 proposed collections. There were 10 Collections Coordinators present.

External events/collaboration

Plant Heritage staff presented our work at four external events this year: the International Symposium of the Korean National Arboretum, PlantNetwork Plant Records group, Craft Skills in Garden Conservation (organised by *Norges grønne fagskole*, hosted by PlantNetwork) and the RHS Lily Group.

Plant Heritage is a partner on a project with Coventry University to support community tree nurseries. We will be paid to deliver workshops on recording and managing plant records.

Sharing guidance

As part of the NLHF project, we will be publishing more of the Persephone help material on our website, plus any resources created as part of this project such as volunteer manuals will be published online.

Workshops

In winter/spring 2022 we held 4 virtual workshops with 179 unique registrations. Topics covered were taxonomy, the work of ICRA, plant health & biosecurity and plant import/exporting

The Persephone 2.0 switchover, in which collections from the "old" version were transferred to the new version, involved one focus group and 9 workshop sessions plus many 1:1s to get approx. 200 users familiar with the new system. As part of the Conference, workshops were held on Persephone (beginners

and advanced), plant photography and putting on a flower show display. There were 42 workshop spaces and 32 attendees (some did multiple sessions).

The workshop programme for 2023, will likely include taxonomy (online), library research, herbarium, photography, Persephone and growing media.

Objective 4: Align Plant Heritage with global thinking on sustainability, biodiversity, conservation and plant taxonomy

We continue to participate in the UK Plant Genetic Resource (UKPGR) group and via this group, as of April 2022, we now have data from some apple collections listed in the European inventory of plant genetic resources ([EURISCO](#)).

Our peat statement is published on the website and our sustainability strategy is in progress.

We continue to facilitate Collection Holders working with the RHS on correcting and correct plant names, some becoming international registrars, and the TPP has collected 5,500 names to date which are additional to those in the RHS' online names portal, for future collaboration.

Support for Collections

There were 6 recipients of Plant Heritage bursaries in 2022, with projects including study visits to fellow Collection Holders, creating new interpretation panels and construction of heated propagation beds

Missing genera campaign

The 'Missing Genera' campaign, launched in 2016, encourages people with a passion for plants to bring together a National Plant Collection of their own and join the Plant Heritage community in growing, sharing and saving plants.

The 2022 campaign highlighted: *Argyranthemum*, *Aruncus*, *Campanula*, *Filipendula*, *Festuca*, *Knautia*, *Pittosporum*, *Silene*, *Spiraea*, *Stachys*, *Vinca* and *Zantedeschia*.

Twelve genera highlighted through the campaign that now have National Plant Collections are *Achillea*, *Arisaema*, *Aeonium*, *Ginkgo*, *Alcea*, *Eryngium*, *Tradescantia*, *Echinops*, *Verbena*, *Hoya*, *Cosmos* and *Thalictrum*.

Brickell Award

Margaret and David MacLennan have been awarded the prestigious Brickell Award 2022 by Plant Heritage, for their *Galanthus* (snowdrop) National Plant Collection®.

The Brickell Award recognises excellence in cultivated plant conservation and has been awarded to a different National Plant Collection Holder every year since 2003. Named after Plant Heritage's founding member and current Vice-President Chris Brickell, it also celebrates the extensive and ongoing commitment, passion and research of National Plant Collection Holders.

This year, Margaret and David MacLennan's National Plant Collection has been celebrated as 'an outstanding example of bringing together a comprehensive collection, used to increase our knowledge and understanding of the genus', according to the judging panel.

Their collection, located in Carlisle, Cumbria, is believed to be the largest systematic and publicly accessible collection in the UK with over 2,000 taxa.

The MacLennans were presented their Brickell Award by John Grimshaw, Director at The Yorkshire Arboretum at RHS Hampton Court Palace Garden Festival on Monday 4th July.

Margaret and David have also built an extensive network of fellow snowdrop enthusiasts throughout the UK, Europe and North America, and are pivotal members of the Plant Heritage North West group. They have created a comprehensive archive of high-quality images which are shared for identification purposes, with specialist groups and national publications, and also for teaching purposes.

Raising Public Awareness of the Need for Plant Conservation

By letting others know about what we do, we can gain their support for plant conservation, so Plant Heritage is actively engaged in sharing expertise. We continue to produce our in-print publications as we increase our presence on social media, and we exhibit at many local and national shows.

Membership and Volunteers

Membership decreased by 3.2% to 3,355 this year, reversing the small increase we saw last year. We have recruited 275 new members this year (444 last year) and the loss of members this year is lower than the average for the last 10 years.

Recruitment is testament to

- the efforts of our groups to hold events and plant fairs in the summer and to keep in touch,
- a strong programme of virtual talks for both members and the public
- the wider awareness of the activities of Plant Heritage, through publicity both locally and centrally, and by press and social media coverage
- plus possibly a reflection of the increased interest in plants and gardening during the pandemic

Members are usually encouraged to participate in the activities of their local Group, of which there are 28 across the UK. These groups are run by volunteer committees who put in a tremendous amount of effort to organise interesting activities for their members and raise funds for the charity. Groups have cautiously restarted their programmes of talks (some as hybrid events), plant fairs, visits and open days, which resulted in local group membership recruitment.

The Board is extremely grateful to each and every volunteer for the time and resources they give so generously to the charity. Their value comes from the skills, experience and support provided by them, whether it is the direct help they give to the staff, or the Collections Coordinators who play such an important role with the National Collection Holders. Volunteers are also vital to the success of all local group activities and provide the manpower needed to support activities such as shows and our seed shop.

Related Parties

The charity has two affiliated groups (Isle of Man and Guernsey) that share the same objectives as Plant Heritage, who generously support our work. The charity also has links with the Wiltshire Gardens Trust who also support our work, and the Irish Garden Plants Society.

Publications, Shows and Campaigns

Website

The new website continues to promote and facilitate interest in Plant Heritage, particularly in the missing genera campaign, finding out about National Collections and forthcoming events.

Annual Directory

In 2022 we published a supplement to the annual Directory of National Plant Collections 2021. This supplement listed all National Plant Collections by county and full details of new collections accredited in

2022 This is issued free to members, but the information can also be accessed on our website so is freely available to the general public. We encourage members and the public to visit the National Collections to see for themselves the conservation efforts of the Collection Holders, and to see the wide range of plants that are being conserved. We thank all our National Collection Holders for opening their collections to the public. All collections are accessible to visitors whether by appointment, through specific open days, or business open days.

The Journal

We published two issues of The Journal with a continued focus on the work of Collection Holders undertaking conservation in action and how education in the widest sense is at the heart of what we do. We are grateful for the continuing work of our editor Clare Hogan in delivering this publication.

E-newsletters

In 2022 we sent 6 e-newsletters (3 focussed on member news and 3 focussed on news for Collection Holders with additional specific event focused e-newsletters, to keep our membership to date with news and events; and collection holders informed on legal, policy and regulatory matters.

Shows

At RHS Chelsea Flower Show 2022 we presented an educational display 'What is your plant passion?' in the Discovery Zone, focussing on the research of four scientific or historical National Plant Collections: *Lavandula* by Dr Simon Charlesworth at Downderry Nursery, *Lathyrus* by Roger Parsons, *Euphorbia* by Oxford Botanic Gardens, and *Iris* bred by Sir Michael Foster, by Lucy Skellorn. The 2021 missing genera was highlighted too. We were delighted to be awarded an RHS Gold Medal and the award for the best display in the Discovery Zone. Thank you to all the National Collection Holders involved for their contributions.

At RHS Hampton Court Garden Festival the Plant Heritage zone included displays of *Cosmos* by Jonathan Sheppard, *Astilbe* by Marwood Hill Gardens, *Hemerocallis* by Paul Harris, *Hosta* (small and miniature) by Jonathan Hogarth, *Rubus* by Barry Clarke, the Sir Harold Hillier Collections. The Threatened Plant of the Year competition was featured, with the Plant Heritage Seed Shop raising funds through donations to support our conservation work. Thank you to all the volunteers who helped at this show and to members who donated seed.

We thank the RHS for their support at these shows.

Regional Shows and local plant fairs

Regional shows and local plant fairs were held again in 2022, successfully raising funds in support of Plant Heritage. The North West Group, working with the Bridgewater team started a new plant fair at RHS Bridgewater in April. We thank all the local Groups and the volunteers involved in presenting these events.

Seed Shop

The Plant Heritage Seed Shop was a great success in 2022 raising money from donations, whilst encouraging more people to grow plants from seed at the RHS Hampton Court Garden Festival, and RHS Chelsea Flower Show, in the online shop and at other plant fairs around the country.

Threatened Plant of the Year Competition

The Threatened Plant of the Year competition was run for the third year and the judging carried out at the RHS Hampton Court Palace Garden Festival. The competition, established in 2020, aims to highlight the message that cultivars can be lost if not actively grown. A secondary aim will be to attempt the re-introduction of winners and those shortlisted plants where possible. 12 entries were shortlisted and published on our website. *Paeonia* 'Gleam of Light', was the judges' winner. Both *Rosa* 'Sir Winston Churchill' and *Aeonium arboreum* 'Albovariegatum' were the joint winners of the public vote.

Virtual talks programme

We continued to hold virtual zoom talks during the winter season and will plan to continue in 2023. Such talks help highlight the invaluable work of National Collection Holders whilst sharing knowledge and experience with our members.

Shows and talks plans for 2022

In 2023 we plan a 45th sapphire anniversary display at our usual Plant Heritage zone at RHS Hampton Court Palace Garden Festival, to include a display of the Threatened Plant of the Year competition and displays by a number of collection holders.

We plan to hold a Members Day & Plant Exchange, on 22 April 2023 at The Wills Conference Centre in Bristol, plus a 45th celebration day on 27th September 2023 at the Hilltop at RHS Wisley Gardens.

Social media

Our website www.plantheritage.org.uk continues to be the main way we provide online information about the National Plant Collections around the country, how to apply for a collection or register a Plant Guardian, and also information about our 27 regional groups, 4 areas with local representatives, affiliated groups and their activities.

Plant Heritage's social media presence is through Twitter, Facebook and Instagram.

The Plant Heritage e-newsletters keep members and others informed of news and events and encourage the public to visit National Collections and get involved in conservation. Meanwhile Twitter, Instagram and Facebook continue to be used to engage the general public and horticulturalists through promoting an understanding of the diversity of garden plants and the need for conserving them.

Press coverage

Over the last reporting year (November 2021 – October 2022), an estimated 217 items* of media coverage have been generated, with an estimated potential audience reach of over 323 million*. This exceeds last year's 190 items and audience reach of 245 million.

The breakdown (which includes regional, national, and gardening media outlets) is as follows:

- 33 broadcast interviews
- 25 regional newspaper articles or features
- 70 magazine articles or features
- 89 online articles or features

Of the 65 items marked as pending, 25 are highly likely to have been published as images and/or more information was sent to the interested outlet. Journalists have been asked to share a PDF of their article but without these, and without media monitoring, these 25 items remain as pending.

A new coverage log has been created for November 2022 – October 2023, which so far contains 12 items. This includes two about the June NPCs (aconites), six about the September NPCs (historic estates) and an additional 21 pending items which are due to be published in the coming months.

*These figures are a conservative estimate as there is no formal media monitoring in place.

Stories promoted since September 2022

- **June NPCs (poisonous aconites focus):** This PR has been picked up six times to date, including BBC Gardeners' World, Country Life and Hertfordshire Life magazines, a half page spread in local paper My Kings News and online via HortWeek, Living Herts and Gardens Illustrated. The latter was a bespoke aconite growing guide written by NPC Holder Melanie Domb. Pending interest includes Garden Answers and RHS The Plant Review.
- **September NPCs (historic estates):** Six items have been published so far, including Country Life, The English Garden US and HortWeek. 11 items are pending including horticultural outlets Garden Answers and Which? Gardening, and regional outlets Exeter Living magazine, the Mid Devon Advertiser and BBC Radio Devon.
- **TPotY 2023:** This PR was issued in November and targeted long lead outlets who hopefully will publish an article when the competition is launched next spring. Interested outlets so far include Gardens Illustrated, Scottish Gardener, Garden Design Journal, Scottish Field, Garden Answers and BBC Gardeners' World magazines.

Treasurer's Financial Review

This year has been one of getting back to normal with more national collections awarded and Groups being able to carry out more plant fairs and fundraising events. We have also had a successful year financially, thanks again to strong legacy income. Overall income was £498,189 (£410,095 in 2021) and expenditure was £392,776 (£341,747 in 2021). The net surplus for the year was therefore £105,413 compared to a net surplus of £68,348 in 2021.

Incoming resources

Following two very successful years for Income from Donations and Legacies, 2022 went even higher with income of £222,868 compared with £156,312 in 2021. This is an exceptional result which was an exceptional year including income from legacies of £160,686 (2021: £71,603). Income from legacies is difficult to predict but the strong income over the last three years has helped Plant Heritage to overcome the challenges of COVID, invest in our future and provide a sound financial platform. With business returning to normal through the year, income from charitable activities (Membership, Shows, Educational Meetings and Events) increased to £254,109 which is a 7% increase on the prior year total of £237,796).

Resources expended

Plant Heritage spent a total of £392,776 (£341,747 in 2021) on Charitable Activities, Fundraising and Governance in 2022, reflecting the return to normal activities. Charitable expenditure, including on plant conservation was £368,377 (2021: £299,657). The costs of generating funds was £24,399 (£42,090 in 2021).

Intangible fixed assets

Intangible fixed assets include the cost of website development work as well as the costs of development of Persephone 2.0. The total value of intangible fixed assets at the end of the year was £90,848 with a further £36,788 added in the year. The Trustees regularly review the value of intangible fixed assets as well as other fixed assets to the business on a regular basis.

Reserves policy

It is the policy of the Charity that unrestricted funds which have not been designated for a specific use, should be maintained at a level equivalent to six months general operating costs, including salaries. The Trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. This level of reserves has been maintained throughout the year and ended the year with £370,043 in the general fund. There are a further £267,532 of reserves designated towards specific purposes. Within the designated funds for specific purposes there are reserves of £30,000 towards the development of a new CRM and other necessary IT expenditure, £15,000 towards the costs of a future office move, and a £60,000 risk reserve to provide a cushion against possible future sudden changes in the Charity's operating environment like that presented by the COVID-19 pandemic.

Going Concern

After the challenges of COVID-19 during 2020 and 2021, this financial year has seen a return to normal and it has also been a financially successful year for Plant Heritage. Given this we consider our operations to be sustainable and that there is an optimistic outlook with no material uncertainty.

The Charity has a healthy reserves position and has met its free reserves target and has also put aside designated funds to mitigate the risks of any similar sudden future change to the Charity's operating environment. The Charity also carefully manages its working capital position and maintains a healthy cash position.

The Trustees have also considered the Charity's plans including investment in Persephone 2.0 for 2023 and are of the view that the level of net current assets and liquid funds are sufficient to ensure future operations and that the Charity is a going concern.

Fundraising Activities

Donations and Sponsorships

Plant Heritage is indebted to its supporters, sponsors, and advertisers – we thank them all for their generous support and in particular:

Griffin Glasshouses
Johnsons Seeds
Burpee Europe Ltd
Melcourt Industries Ltd

Plant Heritage gratefully acknowledges grants and donations from the following charitable trusts and foundations, which help to support our core conservation work as well as the Threatened Plants Programme, National Collection Holder and membership workshops, the Plant Guardians scheme, and our Persephone development work.

Anson Charitable Trust
Hawthorne Charitable Trust
Mrs A A Clutterbuck's Charitable Trust
PF Charitable Trust
Sir Jeremiah Colman Gift Trust
Tanner Trust
William Dean Trust

Income from legacies

We received income from 4 legacies this year, from members. We would like to express our gratitude to Rosemary Day, Sylvia Wyle, Dr Alison Ross and the estate of Joan Tolley for helping us to save our cultivated plants for future generations.

Corporate Members

We are grateful for the continued support of our Gold Corporate Members in 2022:

Barton Grange Garden Centre
Shanly Homes

We are also grateful for the continued support of our Bronze Corporate supporters:

Arboricultural Association	Floral Tours
Bayntun Flowers	Griffin Glasshouses
Broadband UK	Johnsons Seeds
Broadband Providers	Melcourt Industries Ltd
Brother UK	Olympian Garden Buildings
Canonteign Falls	Serenata Flowers
Capital Gardens Ltd	Whatley Manor
Crafty Plants	Woottens of Wenhaston
Doddington Place Gardens	XY Workwear

Transfers from Groups

We continue to be very grateful for the generosity and creativity of our groups who continue to be focused on engaging with Plant Heritage members and raising funds for our work. All our Groups have responded very well to the post-COVID “new normal”.

The charity recognises the commitment and hard work put in by the members of the area groups who fundraise throughout the year and generously pass these contributions on to support the core work of the charity. In all, Groups transferred £61,867 (2021: £21,026) to Central Office. Incoming resources of the Groups increased to £104,599 from £67,958.

Plant Heritage is also grateful to its affiliated groups in Guernsey and Manx, and the Wiltshire Gardens Trust who provide financial support.

Structure, Governance and Management

Plant Heritage is a company limited by guarantee and is governed by its Memorandum and Articles of Association, adopted on 2 February 1988, amended in April 2004, April 2010 and July 2018.

Directors and Trustees

The Board of Trustees are responsible for the overall governance of the charity. The Trustees are also the Directors of the Limited Company. Trustees are appointed by the membership at the Annual General Meeting (AGM). At each AGM, one-third of the directors must retire from office. The directors to retire by rotation must be those who have been longest in office since their last appointment. A director must retire after serving a total of eight years, consecutive or otherwise.

Mrs Cecilia Bufton	Chairman Appointed 5 th October 2017, re-appointed 4 th May 2019, reappointed 28 th April 2022
Mr James Muir Marshall	Vice-Chairman Appointed 18 April 2018, re-appointed 2 nd May 2020, reappointed 28 th April 2022
Mr Gareth Morgan	Treasurer Appointed 10 th July 2020, confirmed 17 th April 2021
Mrs Catherine Penny	Appointed 5 October 2017, re-appointed 2 nd May 2020, re-appointed 28 th April 2022
Mrs Emma Crawforth	Appointed 26 th July 2018, re-appointed 17 th April 2021
Mrs Sally Nex	Appointed 26 th July 2018, re-appointed 17 th April 2021
Ms Helen Triggs	Appointed 4 th May 2019, re-appointed 17 th April 2021, resigned 21 st February 2023
Ms Emma Fontaine	Appointed 2 nd May 2020, resigned 22 nd February 2022
Mr Adrian Stones	Appointed 16 th December 2020, confirmed 17 th April 2021
Ms Phoebe Bracken	Appointed 17 th April 2021, resigned 25 th September 2022
Mrs Mandy Lloyd	Appointed 17 th August 2021
Ms Kavita Kapoor	Appointed 14 th September 2022
Mr Jonathan Sheppard	Appointed 13 th December 2022

The Board met formally on four occasions to discuss the management of the charity.

Governance changes

Plant Heritage held its 2022 AGM virtually and plans to do so again in 2023. Members are able to vote either in person during the meeting, by mail (email or post) or by proxy.

Risk Management

Plant Heritage Trustees have considered the major risks to which the charity is exposed and review these at least annually through a documented risk register. Trustees are satisfied that established procedures are sufficient to manage and mitigate those risks.

Public benefit

Plant Heritage conserves cultivated plants. Trustees have paid due regard to the Charity Commission guidance on public benefit in deciding how to pursue our objectives. Our strategy details how we carry out our work and how we engage with the public.

Committees and Working Groups

Finance Committee (FC) <i>Meetings every two months</i> Responsible for finance • Helen Moorcraft (Chair) • Gareth Morgan • Cecilia Bufton	Conservation Committee (CC) <i>Meetings three times a year</i> Development of Conservation Strategy and delivery of associated programmes and activities • Jim Marshall (Chair) • Emma Crawforth (Vice Chair) • Simon Toomer • Tim Upson • Anne Tweddle • Rosie Yeomans • Catrina Fenton • Chris Clennett
Membership & Supporters Committee (MSC) <i>Meetings three times a year</i> Development of membership strategies and delivery of advice, support, and guidance to Groups • Catherine Penny (Chair) • Penny Ross • Rosemary Buisseret • Maddy Ward • Linda Eggins • Rhona Frayne	Plant Collections Committee (PCC) <i>Meetings four times a year</i> Accreditation of National Plant Collections • Tim Upson (Chair) • Jonathan Webster (Vice-Chairman) • Chris Clennett • Kevin Hobbs • Ross Kerby • Rosie Yeomans • Gary Firth • Matthew Biggs • Chris Trimmer • Chris Bird • Dawn Edwards
Persephone Working Group (PWG) <i>Meetings up to four times a year</i> • Doug Smith (Chair) • David Ross • Penny Ross • Barry Clarke • Gary Firth	
Governance & People Committee (GPC) Governance, compliance, processes, policies, and guidelines. Trustee appointments & HR issues <i>Meetings four times a year</i> • Margaret Headen • Helen Triggs • Adrian Stones • Jim Marshall	

Staffing

The headcount at the end of October 2022 was 6.21 full time posts (including 1 post funded by the National Heritage Lottery Fund). The Board of Trustees wish to thank all the members of staff for their expertise, loyalty, resourcefulness, and commitment to Saving Garden Plants.

Business Plan 2023

Conservation

1. Increase the number of cultivated plants conserved
2. Develop and maintain good standards of curation
3. Inform and engage others with our conservation work
4. Influence global thinking on issues related to plant conservation

Membership & Supporters

5. Grow the membership of Plant Heritage
6. Develop programmes to raise funds from supporters
7. Improve and expand internal communication channels

Finance & Fundraising

8. Oversee financial management
9. Develop a fundraising strategy to ensure Plant Heritage has sufficient income to achieve its charitable aims

Governance and People

10. Oversee the appointment of Trustees and the operation of committees and working groups
11. Ensure that Plant Heritage systems, processes and data management are maintained to a good standard
12. Advise on governance, appointments and operation of national office and local groups

External Communications

13. Inform and engage audiences with our work, with a view to increasing membership, donations and support by providing information across a wide range of media

Statement of Trustees' Responsibilities

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 surplus or deficit for that period. In preparing these financial statements, the Trustees have in their opinion:

- selected suitable accounting policies and then applied them consistently;
- made judgements and estimates that are reasonable and prudent;
- ensured that the applicable accounting standards have been followed; and
- prepared the financial statements on the going concern basis.

The Trustees have been responsible for keeping proper accounting records which disclose, with reasonable accuracy at any time, the financial position of the charity and which have enabled them to ensure that the financial statements comply with the Companies Act 2006. They have also been responsible for the safeguarding of the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Statement of Disclosure of Information to Independent Examiner

So far as the Trustees are aware, there is no relevant information of which the Charity's Independent Examiner has not been informed.

Approved by the Board of Trustees on 27 March 2023 and signed on their behalf by:



Trustee and Chairman
Mrs Cecilia Bufton



Trustee and Treasurer
Mr Gareth Morgan

PLANT HERITAGE

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PLANT HERITAGE

I report to the trustees on my examination of the financial statements of Plant Heritage (the charity) for the year ended 31 October 2022.

Responsibilities and basis of report

As the trustees of the charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities and Trustee Investment (Scotland) Act 2005 (the 2005 Act), the Charities Accounts (Scotland) Regulations 2006 (as amended) and the Companies Act 2006 (the 2006 Act). You are satisfied that the financial statements of the charity are not required by charity or company law to be audited and have chosen instead to have an independent examination.

Having satisfied myself that the accounts of the charity are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the charity's accounts carried out under section 44 (1) (c) of the 2005 Act and section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed the requirements of Regulation 11 of the Charities Accounts (Scotland) Regulations 2006 (as amended) and all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

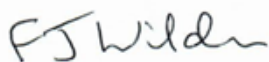
Independent examiner's statement

Since the charity is required by company law to prepare its accounts on an accruals basis and is registered as a charity in Scotland your examiner must be a member of a body listed in Regulation 11(2) of the Charities Accounts (Scotland) Regulations 2006 (as amended). I confirm that I am qualified to undertake the examination because I am a member of the Association of Chartered Certified Accountants, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act and Regulation 4 of the 2006 Accounts Regulations; or
- 2 the financial statements do not accord with those records; or
- 3 the financial statements do not comply with the accounting requirements of Regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended) and do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination; or
- 4 the financial statements have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the financial statements to be reached.



Frances Wilde FCCA DChA

Dated 25 April 2023

Warner Wilde
Chartered Certified Accountants
4 Marigold Drive
Bisley
Surrey, GU24 9SF

PLANT HERITAGE

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 OCTOBER 2022

Current financial year

		Unrestricted funds general 2022 £	Unrestricted funds designated 2022 £	Restricted funds 2022 £	Total 2022 £	Total 2021 £
	Notes					
Income from:						
Donations and legacies	3	181,960	2,847	38,061	222,868	156,312
Charitable activities	4	161,131	92,978	-	254,109	237,796
Total other trading activities	5	10,454	8,708	-	19,162	13,996
Investments	6	1,984	66	-	2,050	1,991
Total income		355,529	104,599	38,061	498,189	410,095
Expenditure on:						
<u>Raising funds</u>						
Costs of generating donations and legacies	7	24,399	-	-	24,399	42,090
<u>Charitable activities</u>						
Membership and Shows	8	43,493	-	485	43,978	38,834
Educational Activities	8	63,593	58,451	4,323	126,367	107,640
Plant Conservation	8	160,458	1,040	36,534	198,032	153,183
Total charitable expenditure		267,544	59,491	41,342	368,377	299,657
Total resources expended		291,943	59,491	41,342	392,776	341,747
Gross transfers between funds		61,867	(61,867)	-	-	-
Net income/(expenditure) for the year/ Net movement in funds		125,453	(16,759)	(3,281)	105,413	68,348
Fund balances at 1 November 2021		244,590	284,291	30,685	559,566	491,218
Fund balances at 31 October 2022		370,043	267,532	27,404	664,979	559,566

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.

PLANT HERITAGE

STATEMENT OF FINANCIAL ACTIVITIES (CONTINUED) INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 OCTOBER 2022

Prior financial year

		Unrestricted funds general 2021 £	Unrestricted funds designated 2021 £	Restricted funds 2021 £	Total 2021 £
	Notes				
Income from:					
Donations and legacies	3	98,002	4,024	54,286	156,312
Charitable activities	4	175,264	62,532	-	237,796
Total other trading activities	5	12,611	1,385	-	13,996
Investments	6	1,974	17	-	1,991
Total income		287,851	67,958	54,286	410,095
Expenditure on:					
<u>Raising funds</u>					
Costs of generating donations and legacies	7	42,090	-	-	42,090
<u>Charitable activities</u>					
Membership and Shows	8	32,624	-	6,210	38,834
Educational Activities	8	73,903	33,241	496	107,640
Plant Conservation	8	101,691	4,463	47,029	153,183
Total charitable expenditure		208,218	37,704	53,735	299,657
Total resources expended		250,308	37,704	53,735	341,747
Net incoming/(outgoing) resources before transfers		37,543	30,254	551	68,348
Gross transfers between funds		(3,974)	3,974	-	-
Net income/(expenditure) for the year/ Net movement in funds		33,569	34,228	551	68,348
Fund balances at 1 November 2020		211,021	250,063	30,134	491,218
Fund balances at 31 October 2021		244,590	284,291	30,685	559,566

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.

PLANT HERITAGE

BALANCE SHEET

AS AT 31 OCTOBER 2022

	Notes	2022 £	£	2021 £	£
Fixed assets					
Intangible assets	13		90,848		77,930
Tangible assets	14		5,465		7,492
			<u>96,313</u>		<u>85,422</u>
Current assets					
Debtors	15	27,000		16,593	
Cash at bank and in hand		581,506		494,336	
		<u>608,506</u>		<u>510,929</u>	
Creditors: amounts falling due within one year	16	(33,848)		(29,443)	
Net current assets			574,658		481,486
Total assets less current liabilities			670,971		566,908
Creditors: amounts falling due after more than one year					
Deferred income	17	5,992	(5,992)	7,342	(7,342)
Net assets			<u>664,979</u>		<u>559,566</u>
Income funds					
Restricted funds	19		27,404		30,685
<u>Unrestricted funds</u>					
Designated funds	20	267,532		284,291	
General unrestricted funds		370,043		244,590	
		<u>637,575</u>		<u>528,881</u>	
			<u>664,979</u>		<u>559,566</u>

PLANT HERITAGE

BALANCE SHEET (CONTINUED)

AS AT 31 OCTOBER 2022

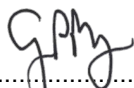
The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 October 2022.

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 27 March 2023



.....
Mr G Morgan
Trustee

Company registration number 2222953

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 OCTOBER 2022

1 Accounting policies

Charity information

Plant Heritage is a private company limited by guarantee incorporated in England and Wales. The registered office is 12 Home Farm, Loseley Park, Guildford, Surrey, GU3 1HS.

1.1 Accounting convention

The financial statements have been prepared in accordance with the charity's governing document, the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) 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)". 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 applying FRS 102 Update Bulletin 1 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, [modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value]. 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.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

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.

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.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2022

1 Accounting policies

(Continued)

1.5 Expenditure

A liability is recognised when either a constructive or legal obligation is identified. Central costs are apportioned between costs of generating funds and charitable activities on the basis of the specific activities of members of staff. Irrecoverable VAT is allocated to the same expenditure heading as the cost to which it relates. Basic financial liabilities are recognised at transaction cost.

1.6 Intangible fixed assets other than goodwill

Intangible assets acquired separately from a business are recognised at cost and are subsequently measured at cost less accumulated amortisation and accumulated impairment losses.

Intangible assets acquired on business combinations are recognised separately from goodwill at the acquisition date where it is probable that the expected future economic benefits that are attributable to the asset will flow to the entity and the fair value of the asset can be measured reliably; the intangible asset arises from contractual or other legal rights; and the intangible asset is separable from the entity.

Amortisation 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:

Website	8 Years Straight Line
Persephone intangibles	4 years straight line

1.7 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:

Plant and machinery	4 Years Straight Line
Computers	4 Years 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.

1.8 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

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.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2022

1 Accounting policies

(Continued)

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.

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.11 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

1.12 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) *FOR THE YEAR ENDED 31 OCTOBER 2022*

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2022

3 Donations and legacies

	Unrestricted funds general 2022 £	Unrestricted funds designated 2022 £	Restricted funds 2022 £	Total 2022 £	Unrestricted funds general 2021 £	Unrestricted funds designated 2021 £	Restricted funds 2021 £	Total 2021 £
Donations and gifts	21,274	2,847	9,000	33,121	26,399	4,024	54,286	84,709
Legacies receivable	160,686	-	-	160,686	71,603	-	-	71,603
Grants	-	-	29,061	29,061	-	-	-	-
	<u>181,960</u>	<u>2,847</u>	<u>38,061</u>	<u>222,868</u>	<u>98,002</u>	<u>4,024</u>	<u>54,286</u>	<u>156,312</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2022

4 Charitable activities

	Membership and Shows 2022 £	Educational Meetings and Events held by Area Groups 2022 £	Total 2022 £	Membership and Shows 2021 £	Educational Meetings and Events held by Area Groups 2021 £	Total 2021 £
Sales within charitable activities	152,692	101,417	254,109	150,101	87,695	237,796
Analysis by fund						
Unrestricted funds - general	152,692	8,439	161,131	150,101	25,163	175,264
Unrestricted funds - designated	-	92,978	92,978	-	62,532	62,532
	152,692	101,417	254,109	150,101	87,695	237,796

5 Total other trading activities

	Unrestricted funds general 2022 £	Unrestricted funds designated 2022 £	Total 2022 £	Unrestricted funds general 2021 £	Unrestricted funds designated 2021 £	Total 2021 £
Advertising, publications, sponsorship and trading	10,454	-	10,454	12,611	-	12,611
Fundraising events	-	8,708	8,708	-	1,385	1,385
Total other trading activities	10,454	8,708	19,162	12,611	1,385	13,996

6 Investments

	Unrestricted funds general 2022 £	Unrestricted funds designated 2022 £	Total 2022 £	Unrestricted funds general 2021 £	Unrestricted funds designated 2021 £	Total 2021 £
Interest receivable	1,984	66	2,050	1,974	17	1,991

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2022

7 Raising funds

	Unrestricted funds general 2022 £	Unrestricted funds general 2021 £
<u>Costs of generating donations and legacies</u>		
Staging fundraising events	2,752	69
Staff costs	12,055	23,023
Depreciation and impairment	2,459	3,466
Support costs	7,133	15,532
Costs of generating donations and legacies	24,399	42,090
	24,399	42,090

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2022

8 Charitable activities

	Membership and Shows 2022 £	Educational Activities 2022 £	Plant Conservation 2022 £	Total 2022 £	Membership and Shows 2021 £	Educational Activities 2021 £	Plant Conservation 2021 £	Total 2021 £
Staff costs	20,618	20,618	98,159	139,395	20,150	20,150	84,562	124,862
Depreciation and impairment	4,235	4,235	16,395	24,865	3,029	3,029	6,041	12,099
Other charitable expenditure	6,140	87,399	32,177	125,716	775	69,102	24,635	94,512
	30,993	112,252	146,731	289,976	23,954	92,281	115,238	231,473
Grant funding of activities (see note 9)	-	1,035	1,040	2,075	-	365	8,040	8,405
Share of support costs (see note 10)	12,190	12,285	47,555	72,030	13,359	13,473	26,872	53,704
Share of governance costs (see note 10)	795	795	2,706	4,296	1,521	1,521	3,033	6,075
	43,978	126,367	198,032	368,377	38,834	107,640	153,183	299,657
Analysis by fund								
Unrestricted funds - general	43,493	63,593	160,458	267,544	32,624	73,903	101,691	208,218
Unrestricted funds - designated	-	58,451	1,040	59,491	-	33,241	4,463	37,704
Restricted funds	485	4,323	36,534	41,342	6,210	496	47,029	53,735
	43,978	126,367	198,032	368,377	38,834	107,640	153,183	299,657

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2022

9 Grants payable

	Educational Activities 2022 £	Plant Conservation 2022 £	Total 2022 £	Educational Activities 2021 £	Plant Conservation 2021 £	Total 2021 £
Grants to institutions:						
Other	-	1,040	1,040	-	8,040	8,040
Grants to individuals	1,035	-	1,035	365	-	365
	<u>1,035</u>	<u>1,040</u>	<u>2,075</u>	<u>365</u>	<u>8,040</u>	<u>8,405</u>

10 Support costs

	Support costs £	Governance costs £	2022 £	Support costs £	Governance costs £	2021 £
Staff costs	24,651	-	24,651	-	-	-
Office running costs	54,513	-	54,513	69,236	-	69,236
Independent Examination and Accounts Preparation	-	3,948	3,948	-	3,859	3,859
Other governance costs including meetings and travelling	-	348	348	-	2,216	2,216
	<u>79,164</u>	<u>4,296</u>	<u>83,460</u>	<u>69,236</u>	<u>6,075</u>	<u>75,311</u>
Analysed between						
Fundraising	7,133	-	7,133	15,532	-	15,532
Charitable activities	72,030	4,296	76,326	53,704	6,075	59,779
	<u>79,163</u>	<u>4,296</u>	<u>83,459</u>	<u>69,236</u>	<u>6,075</u>	<u>75,311</u>

In the 2021 accounts, 'office running costs' included administrative staff costs, which have been split out to 'staff costs' in 2022.

11 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year.

None (2021: none) incurred £nil (2021: £nil) travelling expenses.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2022

12 Employees

The average monthly number of employees during the year was:

	2022 Number	2021 Number
Fundraising	1	1
Plant Conservation	4	3
Membership	1	1
Finance and admin	1	1
Total	7	6

Employment costs

	2022 £	2021 £
Wages and salaries	160,211	155,172
Social security costs	7,921	7,689
Other pension costs	7,969	7,711
	176,101	170,572

9 (2021: 8) part time employees equate to 6.21 (2021: 5.5) full time staff.

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

13 Intangible fixed assets

	Website £	Persephone intangibles £	Total £
Cost			
At 1 November 2021	59,337	41,490	100,827
Additions - internally developed	-	36,788	36,788
At 31 October 2022	59,337	78,278	137,615
Amortisation and impairment			
At 1 November 2021	18,029	4,869	22,898
Amortisation charged for the year	7,417	16,452	23,869
At 31 October 2022	25,446	21,321	46,767
Carrying amount			
At 31 October 2022	33,891	56,957	90,848
At 31 October 2021	41,309	36,621	77,930

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2022

14 Tangible fixed assets

	Plant and machinery £	Computers £	Total £
Cost			
At 1 November 2021	659	13,233	13,892
Additions	-	1,429	1,429
At 31 October 2022	659	14,662	15,321
Depreciation and impairment			
At 1 November 2021	71	6,329	6,400
Depreciation charged in the year	165	3,291	3,456
At 31 October 2022	236	9,620	9,856
Carrying amount			
At 31 October 2022	423	5,042	5,465
At 31 October 2021	588	6,904	7,492

15 Debtors

	2022 £	2021 £
Amounts falling due within one year:		
Trade debtors	6,352	4,946
Other debtors	14,899	3,806
Prepayments and accrued income	5,749	7,841
	27,000	16,593

16 Creditors: amounts falling due within one year

	Notes	2022 £	2021 £
Other taxation and social security		3,564	2,766
Deferred income	17	22,339	14,831
Trade creditors		1,039	5,907
Other creditors		149	887
Accruals		6,757	5,052
		33,848	29,443

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2022

17 Deferred income

	2022 £	2021 £
Other deferred income	28,331	22,173

Deferred income is included in the financial statements as follows:

	2022 £	2021 £
Deferred income is included within:		
Current liabilities	22,339	14,831
Non-current liabilities	5,992	7,342
	28,331	22,173
Movements in the year:		
Deferred income at 1 November 2021	22,173	22,406
Released from previous periods	(6,613)	(18,018)
Resources deferred in the year	12,771	17,785
Deferred income at 31 October 2022	28,331	22,173

18 Retirement benefit schemes

Defined contribution schemes

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently administered fund.

The charge to profit or loss in respect of defined contribution schemes was £7,970 (2021: £7,759).

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2022

19 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 November 2020	Incoming Resources	Resources Expended	Balance at 1 November 2021	Incoming Resources	Resources Expended	Balance at 31 October 2022
	£	£	£	£	£	£	£
Esmee Fairbairn	29,134	40,000	(47,235)	21,899	-	(21,899)	-
Heritage Lottery	-	-	-	-	29,061	(18,109)	10,952
Topinambour Trust	-	4,000	(4,000)	-	-	-	-
Tanner Trust	-	2,000	(2,000)	-	2,000	(1,093)	907
William Dean Countryside Educational Trust	-	500	(500)	-	-	-	-
Heather Society	-	6,500	-	6,500	-	-	6,500
Persephone	-	1,286	-	1,286	7,000	(241)	8,045
West Midlands Shows Fund	1,000	-	-	1,000	-	-	1,000
	<u>30,134</u>	<u>54,286</u>	<u>(53,735)</u>	<u>30,685</u>	<u>38,061</u>	<u>(41,342)</u>	<u>27,404</u>

Tanner Trust - Funding for JSTOR licences.

Esmee Fairbairn - Funding for a Conservation Manager.

Persephone - Funding for the development and operation of an online horticultural database developed for recording plants in collections.

Heritage Lottery - Funding for a Digital Volunteer Officer, saving and sharing digital plant heritage.

West Midland Shows - Held to be used for a show display.

Heather Society - For the advancement of horticulture, in particular conservation, improvement and research into the growing of heaths, heathers and allied plants.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2022

20 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:

	Movement in funds				Movement in funds				Balance at 31 October 2022 £
	Balance at 1 November 2020 £	Incoming Resources £	Resources Expended £	Transfers £	Balance at 1 November 2021 £	Incoming Resources £	Resources Expended £	Transfers £	
Area Groups	170,063	67,958	(37,704)	(21,026)	179,291	104,599	(59,491)	(61,867)	162,532
Project fund	80,000	-	-	(80,000)	-	-	-	-	-
Office Move	-	-	-	15,000	15,000	-	-	-	15,000
CRM	-	-	-	30,000	30,000	-	-	-	30,000
Risk Reserve	-	-	-	60,000	60,000	-	-	-	60,000
	<u>250,063</u>	<u>67,958</u>	<u>(37,704)</u>	<u>3,974</u>	<u>284,291</u>	<u>104,599</u>	<u>(59,491)</u>	<u>(61,867)</u>	<u>267,532</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2022

20 Designated funds

(Continued)

Area Groups

Area Groups carry out activities throughout the year in accordance with the charity's objectives whilst remaining sympathetic and relevant to each group as defined by its members and geographical location. The Designated Fund represents the income and expenditure from group activities and the value retained in bank accounts as at the period end.

Project Fund

The Project Fund provides for spending on specific projects planned for the short to medium term.

Office Move

To fund the relocation costs associated with changing office.

CRM

To fund a new customer relationship management system.

Risk Reserve

For future operational shocks such as COVID.

21 Analysis of net assets between funds

	National Office	Area Groups and Project Fund	Restricted Funds	Total	National Office	Area Groups and Project Fund	Restricted Funds	Total
	2022 £	2022 £	2022 £	2022 £	2021 £	2021 £	2021 £	2021 £
Fund balances at 31 October 2022 are represented by:								
Intangible fixed assets	90,848	-	-	90,848	77,930	-	-	77,930
Tangible assets	5,465	-	-	5,465	7,492	-	-	7,492
Current assets/(liabilities)	279,722	267,532	27,404	574,658	166,510	284,291	30,685	481,486
Long term liabilities	(5,992)	-	-	(5,992)	(7,342)	-	-	(7,342)
	<u>370,043</u>	<u>267,532</u>	<u>27,404</u>	<u>664,979</u>	<u>244,590</u>	<u>284,291</u>	<u>30,685</u>	<u>559,566</u>

PLANT HERITAGE

England & Wales - Charity number 1004009

Accounts



Report of the Trustees and Unaudited Financial Statements
for the Year ended 31 October 2021

Registered Charity No: 1004009/SC041785
Company Registered No 2222953

Patron His Royal Highness The Prince of Wales

President Alan Titchmarsh

Vice-Presidents

Lawrence Banks

Christopher Brickell

Jamie Compton

Lady Hamilton

Roy Lancaster

Sir Roy Strong

Trustees

Mrs C Bufton (Chairman)

Mr J Marshall (Vice Chairman)

Mr G Morgan (Treasurer)

Mrs C Penny

Mrs E Crawforth

Mrs S Nex

Ms E Fontaine

Ms H Triggs

Mr A Stones

Ms P Bracken

Mrs M Lloyd

Charity Number 1004009/SC041785

Company Number 2222953

Independent Examiner Frances Wilde FCCA DChA
Warner Wilde
Chartered Certified Accountants
4 Marigold Drive
Bisley
Surrey
GU24 9SF

Plant Heritage office
12 Home Farm, Loseley Park, Guildford, GU3 1HS
www.plantheritage.org.uk

	Page
Patron, Presidents and Trustees of the Charity*	2
Annual General Meeting 2022*	4
President's Remarks*	5
Chairman's Review*	6-7
Activities in 2020/21: What Plant Heritage does*	
Objectives and Achievements*	8-17
Treasurer's Financial Review*	18-19
Fundraising Activities*	20-21
Structure, Governance and Management*	22-24
Statement of Trustees' Responsibilities	25
Report of the Independent Examiner	26
Statement of Financial Activities	27-28
Balance Sheet	29-30
Notes to the Financial Statements	31-47
*These sections form part of the Trustee's Annual Report	

Annual General Meeting 2022

All members of Plant Heritage have been invited to meet members of the Board (who are Trustees of Plant Heritage) and ask questions on past performance and future plans at the 2022 Annual General Meeting which will be a virtual event on Thursday the 28th April.

Questions about anything contained in this report or the accompanying Financial Statements, should be addressed to the Chairman, by email chairman@plantheritage.org.uk or if that is not possible, by mail Plant Heritage, 12 Home Farm, Loseley Park, Guildford GU3 1HS, or telephone 01483 447540.

President's Remarks

March 2022

We need enthusiasts in life: folk who are prepared to pursue their passion come what may. When that passion involves plants, then not only does the enthusiast benefit, but nature itself and gardeners across the globe are enriched by the efforts of individuals who care. Last year 47 new plant collections were accredited, bringing the total to 690, but there are still individual groups of plants needing to be taken to someone's heart and safeguarded for future generations.

Plant Heritage is a meeting place for these enthusiasts – people like Roger Hammond whose National Collection of *Epimedium* has won him this year's Brickell Award for 30 years of commitment to a genus that he clearly loves and treasures. Roger tends 45 species and 180 cultivars of *Epimedium*, and he is not alone in caring for a group of plants he reveres. Hundreds more gardeners do their bit to conserve valuable plant material and a gene pool whose riches are of immeasurable, though often underrated, value.

Sometimes would-be collection holders face a daunting task. That did not put Louise Danks off re-locating 2,000 individual dahlia plants from the National Collection in Penzance, Cornwall, to a different part of the county. She cajoled 30 friends into helping her and the result is that the collection is now under her care as a newly accredited collection holder in Camborne.

It would be a mistake to imagine that only institutions and grand gardens can play host to National Collections. Some – such as *Kniphofia* and *Echinops* - are cultivated on allotments. Andrew Gladman is hosting them in Warwickshire. Five new plant collections have found their home on council-administered plots, proving that anyone with dedication and know-how can do their bit for conservation regardless of the modesty of their patch of earth. Julian Reed's Sevenoaks allotment plays host to a National Collection of ferns – *Polystichum* – while Adrian Thorne cultivates part of his *Actaea* and *Veronica* (*Parahebe*) collections on his own Kent allotment.

Could you do the same? If there's a group of plants you love and you have access to a suitable patch of ground, why not make enquiries and contribute to an important and ever-growing initiative to save our garden plants for future generations.

Plant Heritage's efforts have been recognized this year by the award of a Heritage Lottery Grant of £68k towards the completion of our vital recording system so that data can be stored and accessed more efficiently. For the first time in 8 years our membership grew but, as ever, there is always room for more enthusiasts, like those in Ireland who have been accredited as the Irish Heritage Plants National Plant Collection, which celebrates Ireland's rich horticultural heritage in 75 different locations, conserving plants with an Irish connection, from the well-known Irish yew to *Iris* 'Kilbroney Marble' – a real rarity with only one listed supplier.

Ventnor Botanic Garden on the Isle of Wight has been awarded National Collection status for its palm trees – some of them dating back to the 1860s. With global warming an ever-growing concern, palms are capable of withstanding outdoor temperatures in the UK far more readily than they were a century or more ago and monitoring their progress at Ventnor will give us a clearer picture of their likely impact on our landscape in the future.

So, you see, Plant Heritage is not simply there to preserve old plants in aspic; it is a vibrant, go-ahead organisation keen to recognise the ongoing value of a wide range of garden plants and to demonstrate the need to move forward with as rich and as diverse a plant palette as possible, not just for decorative reasons, but for the very survival and improvement of our botanical riches and legacy.

Worthwhile? I should say so.

Alan Titchmarsh MBE VMH DL
President

Chairman's Review

Conserving the diversity of cultivated plants is essential to all our futures. The plants grown in National Plant Collections® or held by Plant Guardians® contain unique combinations of genetic material which are the legacy of generations of plant collectors and breeders who have built our nation's rich and unique horticultural landscape. The work of Plant Heritage spans four decades and in the light of climate change and an increasingly urban society, which values horticulture as important to its health and well-being, the charity's work is as important now as it was in the 1970s, when the charity's founders identified that a significant part of the nation's rich horticultural heritage was at risk of disappearing.

Our work is spearheaded by a network of National Collection Holders who come from all walks of life and live across the length and breadth of the British Isles. The beauty of the National Plant Collections is that anyone who has an interest, passion or expertise in a certain group of plants, whether amateur or professional can potentially become a collection holder. In doing so they curate and cultivate their own living collection which then forms part of the largest living collection of garden plants held outside botanical institutions in the UK.

Our National Collection Holders are supported by a dedicated Central Office team including three Plant Conservation specialists who provide technical support across the British Isles. This network is strengthened by our regional network of volunteer Collection Coordinators who regularly visit Collection Holders whilst also seeking out new and potential collections. All applications are then guided through the process by the Plant Conservation Committee. Members of this committee are independent advisers, experts in taxonomy, horticulture, botany and the horticultural trade and area group representatives, all volunteers who freely give their time to ensure National Plant Collections are maintained and looked after to a consistent standard.

The Threatened Plants Programme underpins our conservation work and is an ongoing research initiative which identifies plants threatened and worthy of conserving. The Plant Guardian® scheme encourages members to actively seek out and conserve individual plants. Plant Heritage's education objective is delivered by both our regional groups and the Central Office through a diverse range of events, shows, publications, workshops and other activities. In 2021, many of these were delivered virtually. As a charity, Plant Heritage is funded through membership subscriptions, donations from individuals and industry, sponsorship and donations from charitable trusts.

What are the threats to our garden plants?

Changing fashions

Changes in styles of planting and taste can cause groups of plants to go out of fashion. We don't want to lose the range of cultivars available for when they inevitably come back into fashion.

Changes to the plant sales trade

The requirement for plants to be of a specific size and in flower at the point of sale by garden centres and supermarkets can lead to a diminution of the range of plants grown in our gardens. We are also losing specialist plant nurseries who carry a much wider range of plants.

Climate change

Climate change over time will have a continuing effect on the range of cultivated plants available to the UK.

Pests and pathogens

Due to the nature of modern trade and travel there is an increasing risk of new pests and diseases being introduced to the UK. Recent examples of these include box blight, ash dieback, and agapanthus gall midge.

Loss of propagation or cultivation skills

A lack of horticultural skills, particularly in propagation, is causing a loss in the availability of specialist cultivated plants.

The coronavirus pandemic interrupted, once again many of the plans of the charity with many of the shows and fundraising activities of Groups and Central Office being cancelled. As of March 2022, most restrictions have been lifted and whilst we can't be certain they won't return we are now more confident that we can get back to our normal activities, which should help with our fundraising programme in 2022.

Whilst lockdowns reduced opportunities to meet face to face, our work to keep in touch with members with virtual talks, organised by central office and local groups, in addition to our regular e-newsletters and printed materials has been well received and contributed to our membership growing in 2020/21 for the first time in 8 years. Some local groups also started their own virtual talks and hybrid meetings.

The Conservation Committee took on the task reviewing and updating our Conservation Strategy, with a final version sent to members in March 2022. Detailed workplans have been identified to help us achieve these strategic aims. The Conservation team also consulted National Collection Holders on their use of peat, to inform our response to the Government's Consultation Document. As we move away from using peat-based products, Plant Heritage plans to help members identify suitable alternative growing media and understand the differences in plant growing techniques that may be required

We were able to run the Threatened Plant of the Year competition for the second year and were delighted to be able to award the judges' prize in person to Peter Westbrook, at the RHS Hampton Court Garden Festival. We were delighted to have been awarded an RHS Gold medal for our display at the RHS Chelsea Flower Show 2021. With the RHS moving the flower show to Autumn, plants that never get to shine at the usual Spring event, such as *Canna*, *Hedychium* and *Salvia* came into their own and helped us showcase how National Plant Collections can be held in a variety of different environments and be of any size. Our Seed Shop, with the donation of rhizomes of Irises bred by Sir Cedric Morris, at the RHS Hampton Court Palace Garden Festival was also a great financial success, raising more than £12,000 in donations for seed collected our members.

Staff and the volunteer Persephone working group have made good progress on rebuilding of our Persephone plant collection recording tool and work to transfer the development and maintenance of the software to a commercial organisation is now almost complete. The refreshed system consolidates and improves existing features whilst adding a number of new elements requested by existing users of the software. Work continues to train users and test the new system.

In December 2021 we were notified that Plant Heritage has been awarded National Lottery funding to launch a digital volunteering initiative and break down barriers to heritage. We were one of seventeen projects awarded funding to create digital volunteering opportunities, supporting volunteers to develop and contribute their digital skills. Our project, *Saving and sharing our digital plant heritage*, will recruit and train 15 new volunteers to provide support for the network of collection holders in getting records digitised and stored consistently on to Persephone.

There were no resignations from the Board in 2020 and two additions, with Phoebe Bracken (confirmed at the April 2021 AGM) and Mandy Lloyd (to be confirmed at the April 2022 AGM) joining the Trustee body. Emma Fontaine resigned from the Board in February 2022.

Our Mission is to conserve the rich diversity of cultivated plants in the UK and Ireland but this would not be possible without the commitment of our staff, members, National Collection Holders, Groups and all who volunteer their time and expertise to support and spread the word of our essential work. I would like to record the collective thanks to you all, from the Board of Trustees.

Cecilia Bufton

Chairman

Date 29th March 2022

Trustees Report – Objectives and Achievements

The Board, who are the Trustees of Plant Heritage (“the Charity”), present their annual report for the year ended 31 October 2021, prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity’s governing document, the small companies regime s419(2) Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) and “Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)”

Objectives:

Plant Heritage’s charitable purposes seek to

- promote the conservation of cultivated plants with a focus on endangered or rare garden plants
- encourage and carry out research into the cultivation of rare or endangered plants and related information
- encourage the education of the public in horticultural skills, particularly with regards to cultivated plant conservation
- encourage the introduction and the propagation of rare, cultivated plants not represented in the UK, within the law

We aim to do this by:

- Conserving our horticultural heritage by keeping living examples of plants in the **National Plant Collections**[®] scheme which enables us to coordinate collections, ranging from cultivated and species, to historical, heritage and scientific
- Identifying cultivars at the highest risk of extinction, with the ambition that these can be conserved. We do this through our **Threatened Plants Programme**[™]
- Encouraging individuals to conserve individual plants in the **Plant Guardian**[®] scheme, a register of holders of rare and unusual plants
- Sharing rare plants with gardeners across the UK, through our annual **Plant Exchange**[™]
- Documenting and recording collections of rare plants. This is done by our National Collection Holders and Plant Guardians and in our publications such as the *Directory*, *The Journal*, and through our online plant recording database **Persephone**
- Increasing the variety of garden plants available for gardens in the UK through supporting and undertaking group propagation activities and plant sales
- Ensuring rare plants and collections are supported in perpetuity (for future generations)
- Supporting Plant Guardians and National Collection Holders in their conservation work
- Educating the public in the importance of our work
- Working in partnership with organisations that can support our objectives
- Raising **funds** to support this work

Achievements:

Our Conservation Work

Plants growing in gardens might seem safer than those in the wild, but they can easily be lost forever if nobody is looking after them. Plant Heritage is the only organisation with the aim of conserving garden plants across the British Isles and Ireland.

Our cultivated flora is incredibly rich, resulting from development and care over centuries by dedicated gardeners. The heritage contained in these living organisms can only be preserved by active gardeners in living collections. These plants are a valuable historical and future resource, whether for their beauty, or having edible, medicinal or other useful properties. Each has a unique genetic code making it impossible to replace if lost. Conservation of a diverse range of plants underpins our resilience to a changing world, while meeting challenges such as climate change, pests and diseases and biodiversity loss.

Our conservation work is carried out in line with a five-year strategy that helps us to keep to the highest conservation standards and is delivered through working with National Plant Collection® holders, our volunteers and supporters.

Our conservation strategy aims to:

- increase the number of cultivated plants conserved
- develop and maintain good standards of curation
- inform and engage others with our conservation work
- influence global thinking on issues around plant conservation

Why do we do it?

Plants have always been selected and bred, whether for their beauty, flavour, scent or other reasons. This breeding involves an enormity of human effort and inventiveness that is wasted if the plants cease to be grown.

Climate change, the advance of new pests and diseases, loss of gardens, a diminishing nursery trade and lack of knowledge in the general population all conspire to reduce the diversity of our garden flora. If garden plants go, a tantalising slice of social, cultural and horticultural history dies with them.

We believe that cultivated plants deserve to be a target for conservation. Each one contains a unique combination of genetic material and is testament to human effort and inventiveness.

How do we do it?

National Plant Collections®

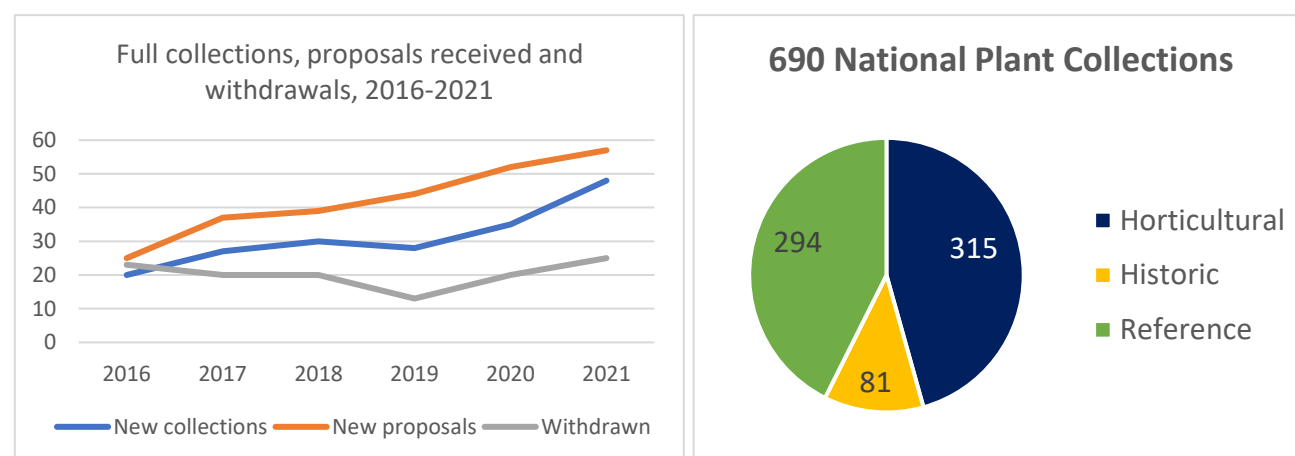
National Plant Collections are held by individuals or organisations who undertake to document, develop and conserve a comprehensive collection of plants within a defined scope and hold them in trust for the future. The scope can be defined botanically by plant group, either taxonomically, such as all the *Penstemon* cultivars or *Rhododendron* subsect. *Falconera*; or have a shared history such as plants collected by Harold Comber; or a geographic link, such as North West English cultivars.

Plant Heritage supports collectors, helping them to tend, monitor and share their collection, guaranteeing the preservation of our garden flora. Members of our Groups all over the country, work together propagating plants and running plant exchanges and sales for funding. The groups also provide collection co-ordinators to advise the collectors and assess the collections.

The National Plant Collections scheme is overseen by the Plant Collections Committee, a sub-committee of the Board, whose members are independent advisers, experts in taxonomy, horticulture, botany and the horticultural trade and area group volunteers. The committee rigorously assesses new applications for scope and coverage.

There were 47 new National Plant Collections accredited in 2021, up from 35 in 2020. There has also been two new scientific collection accredited, as well as 57 new proposals for collections. There were 690 Collections as of December 2021, of which 315 were Horticultural, 294 Reference and 81 Historic collections, with 19 having been awarded Scientific status.

24 collections were withdrawn, but thanks to our policy of encouraging Collection Holders to prepare for the time when they can no longer look after their collection, 7 of these collections have been safely transferred to new owners and a further 4 have offered plant material to secure their future



National Plant Collections are made available for people to view, either by appointment, on special open days or as part of a garden open to the public. They contain about 95,000 plants, held across the 690 collections. Together this represents a huge resource for gardeners, nurserymen, garden designers, researchers, plant breeders and those interested in historical gardens and landscapes. Having these plants part of a registered conservation scheme ensures that they will be a resource for generations to come.

National Plant Collections are valuable for assessing the best cultivars for gardeners to enjoy and are used for scientific research, as a source of live plants and genetic material available for investigating a group of plants. They also provide insurance, being “living libraries” of the genetic diversity of garden plants. There are still some important groups of garden plants that are not represented in National Collections.

Missing genera campaign

The 'Missing Genera' campaign, launched in 2016, encourages people with a passion for plants to bring together a National Plant Collection of their own and join the Plant Heritage community in growing, sharing and saving plants.

From 2016 to 2021 we have highlighted 45 plant groups; eleven of these are now the subject of new National Plant Collections (*Achillea*, *Arisaema*, *Aeonium*, *Ginkgo*, *Alcea*, *Eryngium*, *Tradescantia*, *Echinops*, *Verbena*, *Hoya*, *Cosmos*). This equates to a 24% success rate on new National Collections accredited from this campaign.

Threatened Plants Programme

The Threatened Plants Programme (TPP) tracks the locations and availability of garden cultivars and works out how rare or threatened they are. Information from the Threatened Plants Programme helps collection holders prioritise their sourcing and propagation.

Work has been ongoing to integrate data from National Collections, public and botanic gardens and our other conservation schemes, to facilitate provision of reports for collections and in 2021, 29 reports were written for new collection holders.

Hemerocallis was recently assessed as part of this. Nine National Collections hold 2,605 cultivars of daylily. These represent 39% of all known *Hemerocallis* which have been grown in the UK or Ireland and cover 67% of those Threatened in cultivation. Even across their diverse scopes, 24% of cultivars held are duplicated between current Collections.

The work of the TPP and Plant Heritage was cited as a methodology for tracking the genetic resource of cultivated plants in the 2021 Nature Scot report 'Scotland's Biodiversity Progress to 2020 Aichi Targets'

Plant Guardians®

To preserve plants, it is essential that we keep them growing in gardens. Plant Heritage encourages members to take active part in conservation work by becoming a Plant Guardian. Through the scheme, rare plants are grown in multiple locations as an insurance against loss. Plant Heritage retains a record of plants in guardianship and encourages Plant Guardians to propagate the plants they are caring for and share them with other members via plant sales and the Plant Exchange. New plants recorded this year include *Tropaeolum* 'Hermine Grashoff', noted in 1880 to be 'of considerable value for decorative purposes' and *Santolina* 'Weston' – awarded an AGM at the Chelsea Flower show of 1966.

We have 1,844 plants in the Plant Guardian scheme, with over 300 new registrations in 2021. These plants are held by the 157 registered Plant Guardians. There are 386 cultivars, recorded in over 500 locations, highlighted as "red label plants", threatened in cultivation by the Threatened Plants Programme.

Plant Exchange

The best way to conserve rare plants is to propagate and share them. The Plant Exchange enables hard to find plants being cultivated and conserved by members around the country to be shared with other members. By distributing plants around the country, we can re-establish plants in danger of being lost and give members the chance to get hold of something rare or unusual. We encourage members to propagate these plants and pass them on, to help secure their future.

We were unable to hold the Exchange in 2020 due to the pandemic, and to ensure it could happen in 2021, a one-off event was held at Hill Close Gardens, Warwickshire. Twenty-three Plant Heritage Groups participated, finding new homes for 1,040 plants, including 135 threatened taxa.

Brickell Award

The Brickell award recognises the vital plant conservation work undertaken by Collection Holders to secure plants in cultivation, for example through the rediscovery and propagation of lost taxa and is awarded to those considered to have demonstrated excellence in this field.

The Brickell Award winner 2021 was announced at the RHS Hampton Court Garden Festival, with Roger Hammond, National Collection Holder of *Epimedium*, the recipient of the prestigious award. Roger has built (from scratch) one of the largest collections of *Epimedium* in the country and is fast becoming one of the leading authorities on the genus, making him this year's worthy recipient.

The Award judges commended Roger's deep and ongoing commitment to *Epimedium* over the last 30 years and recognised his successes in the propagation and cultivation of this genus. Roger has built up his collection in his small private garden in Essex, which now contains 45 species and 180 cultivars of *Epimedium*.

Digital Recording

It is important that we record the information gathered by National Collections Holders to create an enduring resource for the future. The use of the Persephone online recording system, which is the preferred method for recording the National Plant Collections, continued to grow and we now have 324 full and proposed Collections on the system. All new applications are being added to Persephone and all proposals for new collections are being supported with getting their records onto the system.

As of December 2021, there are over 48,039 accessions recorded on Persephone along with an increasing library of photographs and other information about collections. Development of the upgraded version made good progress throughout the year, and it is anticipated that the new version will launch in Autumn of 2022, after testing and user training

The Board would like to record its thanks to the whole working group for the hours they continue to give towards this project.

Support for Collections

There were 7 recipients of Plant Heritage bursaries in 2021, with projects ranging from installing rainwater irrigation, improving interpretation and protecting collections from the elements. Some local groups provided bursaries to collection holders and 5 collections received monies via these schemes.

Collection Holder's conference

In November, we held our first, virtual collection holder conference, necessitated by the pandemic. Over 120 people signed up for the event, held on Zoom over two half days. Each day featured talks from collection holders, as well as guests including Tim Upson (RHS) and Fergus Garrett (Great Dixter). There were short workshops on Persephone, growing media, promoting your collection and researching your collection.

Workshops

Many of our regular workshop plans had to be put on hold. We have been running virtual training and workshops for Persephone, taxonomy for beginners, photography, library research and researching your collection. More virtual workshops have been planned for the winter.

Collection Coordinators

We are delighted that we were able to recruit additional volunteer Collection Coordinators in 2021 and now have 42, with vacancies now in 3 areas.

Policy Work

Plant Heritage has participated in the UK Plant Genetic Resource group and contributed plant data on some collections to the EURISCO genetic resource database.

We have also inputted into the government consultation on biosecurity and are working on a response to the government peat consultation.

Raising Public Awareness of the Need for Plant Conservation

By letting others know about what we do, we can gain their support for plant conservation, so Plant Heritage is actively engaged in sharing expertise. We continue to produce our in-print publications as we increase our presence on social media and we exhibit at many local and national shows.

Membership and Volunteers

Trustees are delighted to report that membership has increased by 4.2% to 3,467. This is the first year of increase since 2012/13. We have recruited 444 new members this year and the loss of members this year is also the lowest recorded loss for many years.

Our increased recruitment overall is testament to

- the efforts of our groups to hold events and plant fairs in the summer and to keep in touch,
- a strong programme of virtual talks for both members and the public
- the wider awareness of the activities of Plant Heritage, through publicity both locally and centrally, and by press and social media coverage
- plus possibly a reflection of the increased interest in plants and gardening during the pandemic.

Members are usually encouraged to participate in the activities of their local Group, of which there are 28 across the UK. These groups are run by volunteer committees who put in a tremendous amount of effort to organise interesting activities for their members and raise funds for the charity. Due to the pandemic most group events (except virtual talks) were cancelled until May 2021, then groups cautiously restarted their programmes of talks (some as hybrid events), plant fairs, visits and open days, which resulted in local group membership recruitment.

The Board is extremely grateful to each and every volunteer for the time and resources they give so generously to the charity. Their value comes from the skills, experience and support provided by them, whether it is the direct help they give to the staff, or the Collections Coordinators who play such an important role with the National Collection Holders. Volunteers are also vital to the success of all local

group activities and provide the manpower needed to support activities such as shows and our seed shop.

Related Parties

The charity has two affiliated groups (Isle of Man and Guernsey) that share the same objectives as Plant Heritage, who generously support our work. The charity also has links with the Wiltshire Gardens Trust who also support our work, and the Irish Garden Plants Society.

Publications, Shows and Campaigns

Website

The new website continues to promote and facilitate interest in Plant Heritage, particularly in the missing genera campaign, finding out about National Collections and forthcoming events. From data over a comparable period there has been a 34% increase in users of the website. The website shop has seen increased activity too.

Annual Directory

The annual Directory of National Plant Collections 2021 listed all National Plant Collections with details of the Collection Holder and information about when the Collection is open. This is issued free to members, but the information can also be accessed on our website so is freely available to the general public. We encourage members and the public to visit the National Collections to see for themselves the conservation efforts of the Collection Holders, and to see the wide range of plants that are being conserved. We thank all our National Collection Holders for opening their collections to the public. All collections are accessible to visitors whether by appointment, through specific open days, or business open days.

The Journal

We published two issues of The Journal with a continued focus on the work of Collection Holders undertaking conservation in action and how education in the widest sense is at the heart of what we do. We are grateful for the continuing work of our editor Clare Hogan in delivering this publication.

E-newsletters

In 2021 we sent 6 e-newsletters (3 focussed on member news and 3 focussed on news for Collection Holders with additional specific event focused e-newsletters, to keep our membership to date with news and events; and collection holders informed on legal, policy and regulatory matters.

Shows

RHS Hampton Court Palace Garden Festival was the first national show since 2019. The Plant Heritage zone included a display of *Aeonium* by Mellie Lewis, *Aspidistra* by Philip Oostenbrink, *Hosta* (miniature and small) by Jonathan Hogarth, *Hemerocallis* by Paul Harris, *Hypericum* by Sir Harold Hillier Gardens, a display by Julian Reed of *Polypodium*, *Polystichum* and *Athyrium*, which was awarded Best Plant Heritage Exhibit and Barry Clarke showed four of his National Plant Collections. A full display of The Threatened Plant of the Year competition was featured, with the Plant Heritage Seed Shop raising a record amount of funds to support our conservation work. Thank you to all volunteers who helped at this show and to members who donated seed.

For the first time ever the RHS Chelsea Flower Show was held in September 2021. We had a display in the Discovery Zone entitled 'National Plant Collections Everywhere' designed by Collection Holder Jackie Currie and laid out by the Euphorbia Design team, with some collections on display at RHS Chelsea for the first time. The Urban Jungle and the Potted Paradise featured *Hedychium*, *Canna*, *Solonestemon*, *Salvia*, *Penstemon* and *Nerine*. A boutique indoor area included *Chlorophytum*, *Peperomia*, *Crassula*, *Streptocarpus* and *Neoregelia*. We were delighted to be awarded an RHS Gold Medal and thank the design team along with all the National Collection holders and volunteers who contributed.

We thank the RHS for their support at these shows.

Regional Shows and local plant fairs

Plans by local groups at regional shows were generally cancelled particularly in the spring. The Worcestershire Group show team who previously created displays at RHS Malvern show retired. Displays were not at the Harrogate and Yorkshire shows, nor Gardeners World Live, nor the Shrewsbury Show in 2021. The Suffolk Group held a plant fair at Helmingham Hall.

Local groups were unable to hold spring plant fairs but where possible started to hold plant fairs in the summer and autumn months. Some local group members continued to hold kerb side plant sales where conditions permitted raising some funds locally.

Seed Shop

The Plant Heritage Seed Shop was a great success in 2021 raising money from donations at the RHS Hampton Court Garden Festival, RHS Chelsea Flower Show and at other plant fairs around the country. In addition, seeds are available in the online shop.

Threatened Plant of the Year Competition

The Threatened Plant of the Year competition was run for the second year and the judging carried out at the RHS Hampton Court Palace Garden Festival. The competition, established in 2020, aims to highlight the message that cultivars can be lost if not actively grown. A secondary aim will be to attempt the re-introduction of winners and those shortlisted plants where possible. 12 entries were shortlisted and published on our website. *Camellia* x *williamsii* 'Yesterday', was the judges' winner and *Aspidistra* 'Irish Mist' was the winner of the public vote.

Virtual talks programme

Our programme of virtual events continued in 2021 with approximately 50 webinars run in the year by groups and central office, with over 4,440 attendees. Our data shows that more than 26% of our members engaged in these talks throughout the year. Most were open to all for a small charge with some free for our members only. The added benefit has been to introduce more people to Plant Heritage and to increase awareness of our work. We estimate that we gained 90 new memberships related to the online talks. We continued to support our local groups run their events virtually too.

Shows and talks plans for 2022

In 2022 we plan a display in the Discovery Zone at RHS Chelsea Show showcasing the research of four Collection Holders (was cancelled in 2020/21). Our usual Plant Heritage zone at RHS Hampton Court Palace Garden Festival is also planned, to include a display of the Threatened Plant of the Year

competition.

We plan to hold a Members Day & Plant Exchange, at Renishaw Hall & Gardens in Derbyshire on the 23rd April 2022. We are also delighted that Arabella Lennox-Boyd, will open her garden at Gresgarth Hall, in aid of Plant Heritage on the 5th June 2022.

We also plan to continue with virtual zoom talks, and virtual workshops.

Social media

Our website www.plantheritage.org.uk continues to be the main way we provide online information about the National Plant Collections around the country, how to apply for a collection or register a Plant Guardian, and also information about our 28 regional groups, 4 areas with local representatives, affiliated groups and their activities.

Plant Heritage's social media presence is through Twitter, Facebook and Instagram. The wordpress blog is also available.

Instagram https://www.instagram.com/plantheritage/	3009 followers
Facebook https://www.facebook.com/OurPlantHeritage	5250 followers
Twitter https://twitter.com/plantheritage	15.6K followers

The Plant Heritage e-newsletters keep members and others informed of news and events and encourage the public to visit National Collections and get involved in conservation. Meanwhile Twitter, Instagram and Facebook continue to be used to engage the general public and horticulturalists through promoting an understanding of the diversity of garden plants and the need for conserving them.

Press coverage

Between November 2020 and October 2021, 190 items of media coverage about Plant Heritage were achieved, with an estimated total audience reach of over 245 million. This surpasses the previous year's total of 160 items of coverage with an estimated audience reach of 129 million. PR & Media coverage has been identified as attracting new members and has been noted by some groups as increasing interest in local activities too

Items of coverage include:

- 28 broadcast interviews by Plant Heritage staff, National Plant Collection (NPC) Holders and National Collection Coordinators
- Four national newspaper articles, from The Sunday Telegraph to The Irish Times
- 18 regional newspaper articles published local stories, such as the Brentwood Gazette covering Roger Hammond's Brickell Award win and the Isle of Wight Observer covering Ventnor Botanic Garden's new palm tree NPC
- 62 magazine features, including a four-page spread in Woman & Home about five NPC Holders
- 78 online articles, including 22 items about the Missing Genera 2021

Top stories promoted since September 2020 include:

Plant Heritage at RHS Chelsea

Irish Heritage Plants - new National Plant Collection - published by over 16 outlets to date. The story was also published in national newspaper, The Irish News, in Country Life magazine, and online on The Irish Times, The Irish News, HortWeek and www.GrowTrade.ie.

September National Plant Collections with a focus on allotments – another popular story, with nine items of media coverage - six interviews broadcast across BBC Radio Kent and BBC Radio Wiltshire, and three online articles including The Sun Gardening. Articles in Garden News, Garden Answers magazines, Countryfile magazine and The Daily Telegraph are in progress at the time of reporting.

Treasurer's Financial Review

The year has been one of transition as the impact of COVID-19 slowly recedes. Plant Heritage has again demonstrated financial resilience with overall income of £410,095 (£400,213 in 2020) and expenditure of £341,747 (£347,870 in 2020). The net surplus for the year was therefore £68,348 compared to a net surplus of £52,343 in 2020.

Incoming resources

Income from Donations and Legacies held up well in 2021 with income of £156,312 compared with £177,879 in 2020 which was an exceptional year including income from legacies of £71,603, 17% higher than the £61,000 in 2020. With continued uncertainty in the light of the COVID-19 pandemic during the first part of the year, income from charitable activities (Membership, Shows, Educational Meetings and Events) increased to £237,796 which is a 17% increase on the prior year total of £203,782 but down on 2019.

Resources expended

Plant Heritage spent a total of £341,747 (£347,870 in 2020) on Charitable Activities, Fundraising and Governance in 2021. Charitable expenditure, including on plant conservation was £299,657 (2020: £303,426). The costs of generating funds was £42,090 (£44,444 in 2020).

Intangible fixed assets

Intangible fixed assets include the cost of website development work as well as the costs of development of Persephone 2.0. These amounted to £41,490 during the year.

Reserves policy

It is the policy of the Charity that unrestricted funds which have not been designated for a specific use, should be maintained at a level equivalent to six months general operating costs, including salaries. The Trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. This level of reserves has been maintained throughout the year and there are a further £284,291 of reserves designated towards specific purposes. These funds include £30,000 towards the development of a new CRM and other necessary IT expenditure, £15,000 towards the costs of a future office move, and a £60,000 risk reserve to provide a cushion against possible future sudden changes in the Charity's operating environment similar to that presented by the COVID-19 pandemic. After these designations, the Charity has free reserves in the General Fund of £244,590 representing nearly 8 months of total annual expenditure.

Going Concern

COVID-19 has had a significant impact on the wider economy during 2020 and 2021 and has impacted on the Charity's operations with more remote working, limited ability to have and attend Shows and with Events being limited to virtual channels for much of the time however, the result for this financial year and last demonstrated the Charity's adaptability, and financial strength. Given this we consider our operations to be sustainable and that there is an optimistic outlook with no material uncertainty.

The Charity has a healthy reserves position and has met its free reserves target and has also put aside designated funds to mitigate the risks of any similar sudden future change to the Charity's operating environment. The Charity also carefully manages its working capital position and maintains a healthy cash position.

The Trustees have also considered the Charity's plans including investment in Persephone 2.0 for 2022 and are of the view that the level of net current assets and liquid funds are sufficient to ensure future operations and that the Charity is a going concern.

Fundraising Activities

Donations and Sponsorships

Plant Heritage is indebted to its supporters, sponsors and advertisers – we thank them all for their generous support and in particular:

Griffin Glasshouses
Johnsons Seeds
Burpee Europe Ltd
Melcourt Industries Ltd

Plant Heritage gratefully acknowledges grants and donations from the following charitable trusts and foundations, which help to support our core conservation work as well as the Threatened Plants Programme, National Collection Holder and membership workshops, the Plant Guardians scheme and our Persephone development work.

Sir Jeremiah Colman Gift Trust
Esmée Fairbairn Foundation
Hawthorne Charitable Trust
Topinambour Trust
Goulburn Charitable Trust

William Dean Trust
PF Charitable Trust
Tanner Trust
Anson Charitable Trust
Mrs A A Clutterbuck's Charitable Trust

Donation from the Heather Society as the society closed, to help further work with heathers and to support plant conservation

Income from legacies

We received income from three legacies this year, from members. We would like to express our gratitude to Rosemary Day, Gillian Barwick and the estate of Joan Tolley for helping us to save our cultivated plants for future generations.

Corporate Members

We are grateful for the continued support of our Gold Corporate Members in 2021:

Barton Grange Garden Centre
Candide Ltd
Shanly Homes

We are also grateful for the continued support of our Bronze Corporate supporters:

Arboricultural Association	Floral Tours
Bayntun Flowers	Griffin Glasshouses
Broadband UK	Johnsons Seeds
Brother UK	Melcourt Industries Ltd
Canonteign Falls	National Trust Middlethorpe Hall
Capital Gardens Ltd	Prickly Fish Farm
Crafty Plants	Serenata Flowers
Doddington Place Gardens	Todd's Botanics

Transfers from Groups

Despite another very challenging year, we remain very grateful for the generosity and creativity of our groups who, despite the continued challenges of the pandemic in the financial year, remained focused on engaging with Plant Heritage members and raising funds for our work.

The charity recognises the commitment and hard work put in by the members of the area groups who fundraise throughout the year and generously pass these contributions on to support the core work of the charity. In all, Groups transferred £21,026 (2020: £66,591) to Central Office. In another challenging year, the Groups made a profit of £30,254 (2020: loss of £227). Plant Heritage is also grateful to its affiliated groups in Guernsey and Manx, and the Wiltshire Gardens Trust who provide financial support.

Structure, Governance and Management

Plant Heritage is a company limited by guarantee and is governed by its Memorandum and Articles of Association, adopted on 2 February 1988, amended in April 2004, April 2010 and July 2018

Directors and Trustees

The Board of Trustees are responsible for the overall governance of the charity. The Trustees are also the Directors of the Limited Company. Trustees are appointed by the membership at the Annual General Meeting (AGM). At each AGM, one-third of the directors must retire from office. The directors to retire by rotation must be those who have been longest in office since their last appointment. A director must retire after serving a total of eight years, consecutive or otherwise.

The following served during the year 2020-2021:

Mrs Cecilia Bufton	Chairman Appointed 5 th October 2017, re-appointed 4 th May 2019
Mr James Muir Marshall	Vice-Chairman Appointed 18 April 2018, re-appointed 2 nd May 2020
Mr Gareth Morgan	Treasurer Appointed 10 th July 2020, confirmed 17 th April 2021
Mrs Catherine Penny	Appointed 5 October 2017, re-appointed 2 nd May 2020
Mrs Emma Crawforth	Appointed 26 th July 2018, re-appointed 17 th April 2021
Mrs Sally Nex	Appointed 26 th July 2018, re-appointed 17 th April 2021
Ms Helen Triggs	Appointed 4 th May 2019, re-appointed 17 th April 2021
Ms Emma Fontaine	Appointed 2 nd May 2020 resigned 22 nd February 2022
Mr Adrian Stones	Appointed 16 th December 2020, confirmed 17 th April 2021
Ms Phoebe Bracken	Appointed 17 th April 2021
Mrs Mandy Lloyd	Appointed 17 th August 2021

The Board met formally on four occasions to discuss the management of the charity.

Governance changes

Plant Heritage held its 2021 AGM virtually and plans to do so again in 2022. Members are able to vote either in person during the meeting, by mail (email or post) or by proxy.

Risk Management

Plant Heritage Trustees have given consideration to the major risks to which the charity is exposed and review these at least annually through a documented risk register. Trustees are satisfied that established procedures are sufficient to manage and mitigate those risks.

Public benefit

Plant Heritage conserves cultivated plants. Trustees have paid due regard to the Charity Commission guidance on public benefit in deciding how to pursue our objectives. Our strategy details how we carry out our work and how we engage with the public.

Committees and Working Groups

Finance Committee (FC) <i>Meetings every two months</i> Responsible for finance • Helen Moorcraft (Chair) • Gareth Morgan • Cecilia Bufton • Philip Eastell (Corporate Sponsorship)	Conservation Committee (CC) <i>Meetings three times a year</i> Development of Conservation Strategy and delivery of associated programmes and activities • Jim Marshall (Chair) • Emma Crawford (Vice Chair) • Simon Toomer • Tim Upson • Anne Tweddle • Rosie Yeomans • Catrina Fenton • Chris Clennett
Membership & Supporters Committee (MSC) <i>Meetings two-three times a year</i> Development of membership strategies and delivery of advice, support and guidance to Groups • Catherine Penny (Chair) • Penny Ross • Rosemary Buisseret • Maddy Ward • Linda Eggins • Rhona Frayne	Plant Collections Committee (PCC) <i>Meetings four times a year</i> Accreditation of National Plant Collections • Tim Upson (Chair) • Jonathan Webster (Vice-Chairman) • Chris Clennett • Kevin Hobbs • Ross Kerby • Rosie Yeomans • Gary Firth • Matthew Biggs • Chris Trimmer • Chris Bird • Dawn Edwards
Persephone Working Group (PWG) <i>Meetings up to four times a year</i> • Doug Smith (Chair) • David Ross • Penny Ross • Barry Clarke • Gary Firth	
Governance & People Committee (GPC) Governance, compliance, processes, policies and guidelines. Trustee appointments & HR issues <i>Meetings four times a year</i> • Margaret Headen • Helen Triggs • Adrian Stones • Jim Marshall	

Staffing

The headcount at the end of October 2021 was 5.03 full time posts. The Board of Trustees wish to thank all the members of staff for their expertise, loyalty, resourcefulness and commitment to Saving Garden Plants.

Business Plan 2022

Conservation

1. Increase the number of cultivated plants conserved
2. Develop and maintain good standards of curation
3. Inform and engage others with our conservation work
4. Influence global thinking on issues related to plant conservation

Membership & Supporters

5. Grow the membership of Plant Heritage
6. Develop programmes to raise funds from supporters
7. Improve and expand internal communication channels

Finance & Fundraising

8. Oversee financial management
9. Develop a fundraising strategy to ensure Plant Heritage has sufficient income to achieve its charitable aims

Governance and People

10. Oversee the appointment of Trustees and the operation of committees and working groups
11. Ensure that Plant Heritage systems, processes and data management are maintained to a good standard
12. Advise on governance, appointments and operation of national office and local groups

External Communications

13. Inform and engage audiences with our work, with a view to increasing membership, donations and support by providing information across a wide range of media

Statement of Trustees' Responsibilities

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 surplus or deficit for that period. In preparing these financial statements, the Trustees have in their opinion:

- selected suitable accounting policies and then applied them consistently;
- made judgements and estimates that are reasonable and prudent;
- ensured that the applicable accounting standards have been followed; and
- prepared the financial statements on the going concern basis.

The Trustees have been responsible for keeping proper accounting records which disclose, with reasonable accuracy at any time, the financial position of the charity and which have enabled them to ensure that the financial statements comply with the Companies Act 2006. They have also been responsible for the safeguarding of the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Statement of Disclosure of Information to Independent Examiner

So far as the Trustees are aware, there is no relevant information of which the Charity's Independent Examiner has not been informed.

Approved by the Board of Trustees on 29th March 2022 and signed on their behalf by:



Trustee and Chairman
Mrs Cecilia Bufton



Trustee and Treasurer
Mr Gareth Morgan

PLANT HERITAGE

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PLANT HERITAGE

I report to the trustees on my examination of the financial statements of Plant Heritage (the charity) for the year ended 31 October 2021.

Responsibilities and basis of report

As the trustees of the charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities and Trustee Investment (Scotland) Act 2005 (the 2005 Act), the Charities Accounts (Scotland) Regulations 2006 (as amended) and the Companies Act 2006 (the 2006 Act). You are satisfied that the financial statements of the charity are not required by charity or company law to be audited and have chosen instead to have an independent examination.

Having satisfied myself that the accounts of the charity are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the charity's accounts carried out under section 44 (1) (c) of the 2005 Act and section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed the requirements of Regulation 11 of the Charities Accounts (Scotland) Regulations 2006 (as amended) and all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

Independent examiner's statement

Since the charity is required by company law to prepare its accounts on an accruals basis and is registered as a charity in Scotland your examiner must be a member of a body listed in Regulation 11(2) of the Charities Accounts (Scotland) Regulations 2006 (as amended). I confirm that I am qualified to undertake the examination because I am a member of the Association of Chartered Certified Accountants, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act and Regulation 4 of the 2006 Accounts Regulations; or
- 2 the financial statements do not accord with those records; or
- 3 the financial statements do not comply with the accounting requirements of Regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended) and do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination; or
- 4 the financial statements have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the financial statements to be reached.

Frances Wilde FCCA DChA

Dated 1 April 2022



Warner Wilde
Chartered Certified Accountants
4 Marigold Drive
Bisley
Surrey, GU24 9SF

PLANT HERITAGE

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 OCTOBER 2021

Current financial year

		Unrestricted funds general 2021 £	Unrestricted funds designated 2021 £	Restricted funds 2021 £	Total 2021 £	Total 2020 £
	Notes					
Income from:						
Donations and legacies	3	98,002	4,024	54,286	156,312	177,889
Charitable activities	4	175,264	62,532	-	237,796	203,782
Advertising, publications, sponsorship and trading	5	12,611	1,385	-	13,996	15,974
Investments	6	1,974	17	-	1,991	2,568
Total income		287,851	67,958	54,286	410,095	400,213
Expenditure on:						
<u>Raising funds</u>						
Costs of generating donations and legacies	7	42,090	-	-	42,090	43,678
Trading costs	7	-	-	-	-	766
		42,090	-	-	42,090	44,444
<u>Charitable activities</u>						
Membership and Shows	8	32,624	-	6,210	38,834	38,533
Educational Activities	8	73,903	33,241	496	107,640	99,251
Plant Conservation	8	101,691	4,463	47,029	153,183	165,642
Total charitable expenditure		208,218	37,704	53,735	299,657	303,426
Total resources expended		250,308	37,704	53,735	341,747	347,870
Gross transfers between funds		(3,974)	3,974	-	-	-
Net income for the year/ Net movement in funds		33,569	34,228	551	68,348	52,343
Fund balances at 1 November 2020		211,021	250,063	30,134	491,218	438,875
Fund balances at 31 October 2021		244,590	284,291	30,685	559,566	491,218

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.

PLANT HERITAGE

STATEMENT OF FINANCIAL ACTIVITIES (CONTINUED) INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 OCTOBER 2021

Prior financial year

		Unrestricted funds general 2020 £	Unrestricted funds designated 2020 £	Restricted funds 2020 £	Total 2020 £
	Notes				
Income from:					
Donations and legacies	3	110,801	3,588	63,500	177,889
Charitable activities	4	164,396	39,386	-	203,782
Advertising, publications, sponsorship and trading	5	12,613	3,361	-	15,974
Investments	6	2,450	118	-	2,568
Total income		290,260	46,453	63,500	400,213
Expenditure on:					
<u>Raising funds</u>					
Costs of generating donations and legacies	7	43,678	-	-	43,678
Trading costs	7	766	-	-	766
		44,444	-	-	44,444
<u>Charitable activities</u>					
Membership and Shows	8	29,248	-	9,285	38,533
Educational Activities	8	58,830	40,421	-	99,251
Plant Conservation	8	107,749	6,259	51,634	165,642
Total charitable expenditure		195,827	46,680	60,919	303,426
Total resources expended		240,271	46,680	60,919	347,870
Net incoming resources before transfers		49,989	(227)	2,581	52,343
Gross transfers between funds		66,591	(66,591)	-	-
Net income for the year/ Net movement in funds		116,580	(66,818)	2,581	52,343
Fund balances at 1 November 2019		94,441	316,881	27,553	438,875
Fund balances at 31 October 2020		211,021	250,063	30,134	491,218

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.

PLANT HERITAGE

BALANCE SHEET

AS AT 31 OCTOBER 2021

	Notes	2021 £	£	2020 £	£
Fixed assets					
Intangible assets	13		77,930		48,726
Tangible assets	14		7,492		10,111
			<u>85,422</u>		<u>58,837</u>
Current assets					
Debtors	15	16,593		14,470	
Cash at bank and in hand		494,336		456,107	
		<u>510,929</u>		<u>470,577</u>	
Creditors: amounts falling due within one year	16	(29,443)		(30,480)	
Net current assets			481,486		440,097
Total assets less current liabilities			566,908		498,934
Creditors: amounts falling due after more than one year					
Deferred income	17	7,342	(7,342)	7,716	(7,716)
Net assets			<u>559,566</u>		<u>491,218</u>
Income funds					
Restricted funds	19		30,685		30,134
<u>Unrestricted funds</u>					
Designated funds	20	284,291		250,063	
General unrestricted funds		244,590		211,021	
		<u>528,881</u>		<u>461,084</u>	
			<u>559,566</u>		<u>491,218</u>

PLANT HERITAGE

BALANCE SHEET (CONTINUED)

AS AT 31 OCTOBER 2021

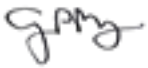
The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 October 2021.

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 29 March 2022



Mr G Morgan
Trustee

Company Registration No. 2222953

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 OCTOBER 2021

1 Accounting policies

Charity information

Plant Heritage is a private company limited by guarantee incorporated in England and Wales. The registered office is 12 Home Farm, Loseley Park, Guildford, Surrey, GU3 1HS.

1.1 Accounting convention

The financial statements have been prepared in accordance with the charity's governing document, the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) 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)". 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 applying FRS 102 Update Bulletin 1 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, modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value. 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.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

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.

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.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2021

1 Accounting policies

(Continued)

1.5 Expenditure

A liability is recognised when either a constructive or legal obligation is identified. Central costs are apportioned between costs of generating funds and charitable activities on the basis of the specific activities of members of staff. Irrecoverable VAT is allocated to the same expenditure heading as the cost to which it relates. Basic financial liabilities are recognised at transaction cost.

1.6 Intangible fixed assets other than goodwill

Intangible assets acquired separately from a business are recognised at cost and are subsequently measured at cost less accumulated amortisation and accumulated impairment losses.

Intangible assets acquired on business combinations are recognised separately from goodwill at the acquisition date where it is probable that the expected future economic benefits that are attributable to the asset will flow to the entity and the fair value of the asset can be measured reliably; the intangible asset arises from contractual or other legal rights; and the intangible asset is separable from the entity.

Amortisation 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:

Website	8 Years Straight Line
Persephone intangibles	4 years straight line

1.7 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:

Plant and machinery	4 Years Straight Line
Computers	4 Years 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.

1.8 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

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.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2021

1 Accounting policies

(Continued)

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.

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.11 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

1.12 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) *FOR THE YEAR ENDED 31 OCTOBER 2021*

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2021

3 Donations and legacies

	Unrestricted funds general 2021 £	Unrestricted funds designated 2021 £	Restricted funds 2021 £	Total 2021 £	Unrestricted funds general 2020 £	Unrestricted funds designated 2020 £	Restricted funds 2020 £	Total 2020 £
Donations and gifts	26,399	4,024	54,286	84,709	38,488	3,588	63,500	105,576
Legacies receivable	71,603	-	-	71,603	61,000	-	-	61,000
Coronavirus Job Retention Scheme	-	-	-	-	11,313	-	-	11,313
	<u>98,002</u>	<u>4,024</u>	<u>54,286</u>	<u>156,312</u>	<u>110,801</u>	<u>3,588</u>	<u>63,500</u>	<u>177,889</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2021

4 Charitable activities

	Membership and Shows	Educational Meetings and Events held by Area Groups	Total 2021	Membership and Shows	Educational Meetings and Events held by Area Groups	Total 2020
	2021	2021		2020	2020	
	£	£	£	£	£	£
Sales within charitable activities	150,101	87,695	237,796	156,388	47,394	203,782
Analysis by fund						
Unrestricted funds - general	150,101	25,163	175,264	156,388	8,008	164,396
Unrestricted funds - designated	-	62,532	62,532	-	39,386	39,386
	150,101	87,695	237,796	156,388	47,394	203,782

5 Advertising, publications, sponsorship and trading

	Unrestricted funds general	Unrestricted funds designated	Total	Unrestricted funds general	Unrestricted funds designated	Total
	2021	2021	2021	2020	2020	2020
	£	£	£	£	£	£
Advertising, publications, sponsorship and trading income	12,611	-	12,611	12,613	-	12,613
Fundraising events	-	1,385	1,385	-	3,361	3,361
Advertising, publications, sponsorship and trading	12,611	1,385	13,996	12,613	3,361	15,974

6 Investments

	Unrestricted funds general	Unrestricted funds designated	Total	Unrestricted funds general	Unrestricted funds designated	Total
	2021	2021	2021	2020	2020	2020
	£	£	£	£	£	£
Interest receivable	1,974	17	1,991	2,450	118	2,568

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2021

7 Raising funds

	Unrestricted funds general 2021 £	Unrestricted funds general 2020 £
<u>Costs of generating donations and legacies</u>		
Staging fundraising events	69	189
Staff costs	23,023	29,610
Depreciation and impairment	3,466	1,588
Support costs	15,532	12,291
Costs of generating donations and legacies	42,090	43,678
<u>Trading costs</u>		
Support costs	-	766
	42,090	44,444

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2021

8 Charitable activities

	Membership and Shows 2021 £	Educational Activities 2021 £	Plant Conservation 2021 £	Total 2021 £	Membership and Shows 2020 £	Educational Activities 2020 £	Plant Conservation 2020 £	Total 2020 £
Staff costs	20,150	20,150	84,562	124,862	20,135	15,677	84,398	120,210
Depreciation and impairment	3,029	3,029	6,041	12,099	1,215	1,215	5,325	7,755
Other charitable expenditure	775	69,102	24,635	94,512	913	71,673	10,824	83,410
	<u>23,954</u>	<u>92,281</u>	<u>115,238</u>	<u>231,473</u>	<u>22,263</u>	<u>88,565</u>	<u>100,547</u>	<u>211,375</u>
Grant funding of activities (see note 9)	-	365	8,040	8,405	-	701	10,815	11,516
Share of support costs (see note 10)	13,359	13,473	26,872	53,704	15,684	9,399	51,710	76,793
Share of governance costs (see note 10)	1,521	1,521	3,033	6,075	586	586	2,570	3,742
	<u>38,834</u>	<u>107,640</u>	<u>153,183</u>	<u>299,657</u>	<u>38,533</u>	<u>99,251</u>	<u>165,642</u>	<u>303,426</u>
Analysis by fund								
Unrestricted funds - general	32,624	73,903	101,691	208,218	29,248	58,830	107,749	195,827
Unrestricted funds - designated	-	33,241	4,463	37,704	-	40,421	6,259	46,680
Restricted funds	6,210	496	47,029	53,735	9,285	-	51,634	60,919
	<u>38,834</u>	<u>107,640</u>	<u>153,183</u>	<u>299,657</u>	<u>38,533</u>	<u>99,251</u>	<u>165,642</u>	<u>303,426</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2021

9 Grants payable

	Educational Activities 2021 £	Plant Conservation 2021 £	Total 2021 £	Educational Activities 2020 £	Plant Conservation 2020 £	Total 2020 £
Grants to institutions:						
Other	-	8,040	8,040	-	10,815	10,815
Grants to individuals	365	-	365	701	-	701
	<u>365</u>	<u>8,040</u>	<u>8,405</u>	<u>701</u>	<u>10,815</u>	<u>11,516</u>

10 Support costs

	Support costs £	Governance costs £	2021 £	Support costs £	Governance costs £	2020 £
Office running costs	69,236	-	69,236	89,083	-	89,083
Independent Examination and Accounts Preparation	-	3,859	3,859	-	3,797	3,797
Other governance costs including meetings and travelling	-	2,216	2,216	-	712	712
	<u>69,236</u>	<u>6,075</u>	<u>75,311</u>	<u>89,083</u>	<u>4,509</u>	<u>93,592</u>
Analysed between						
Fundraising	15,532	-	15,532	12,291	-	12,291
Trading	-	-	-	-	766	766
Charitable activities	53,704	6,075	59,779	76,793	3,742	80,535
	<u>69,236</u>	<u>6,075</u>	<u>75,311</u>	<u>89,084</u>	<u>4,508</u>	<u>93,592</u>

Support costs 'office running costs' includes administrative staff costs.

11 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year, but none (2020: two) of them incurred £nil (2020: £486) travelling expenses.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2021

12 Employees

Number of employees

The average monthly number of employees during the year was:

	2021 Number	2020 Number
Fundraising	1	1
Plant Conservation	3	3
Membership	1	1
Finance and admin	1	1
	<u>6</u>	<u>6</u>

Employment costs

	2021 £	2020 £
Wages and salaries	155,172	152,732
Social security costs	7,689	7,687
Other pension costs	7,711	7,637
	<u>170,572</u>	<u>168,056</u>

8 (2020: 8) part time employees equate to 5.5 (2020: 5.5) full time staff.

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

13 Intangible fixed assets

	Website £	Persephone intangibles £	Total £
Cost			
At 1 November 2020	59,338	-	59,338
Additions - internally developed	-	41,490	41,490
	<u>59,338</u>	<u>41,490</u>	<u>100,828</u>
At 31 October 2021	59,338	41,490	100,828
Amortisation and impairment			
At 1 November 2020	10,612	-	10,612
Amortisation charged for the year	7,417	4,869	12,286
	<u>18,029</u>	<u>4,869</u>	<u>22,898</u>
At 31 October 2021	18,029	4,869	22,898
Carrying amount			
At 31 October 2021	<u>41,309</u>	<u>36,621</u>	<u>77,930</u>
At 31 October 2020	<u>48,726</u>	<u>-</u>	<u>48,726</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2021

14 Tangible fixed assets

	Plant and machinery £	Computers £	Total £
Cost			
At 1 November 2020	-	13,233	13,233
Additions	659	-	659
At 31 October 2021	659	13,233	13,892
Depreciation and impairment			
At 1 November 2020	-	3,122	3,122
Depreciation charged in the year	71	3,207	3,278
At 31 October 2021	71	6,329	6,400
Carrying amount			
At 31 October 2021	588	6,904	7,492
At 31 October 2020	-	10,111	10,111

15 Debtors

	2021 £	2020 £
Amounts falling due within one year:		
Trade debtors	4,946	5,740
Other debtors	3,806	3,527
Prepayments and accrued income	7,841	5,203
	16,593	14,470

16 Creditors: amounts falling due within one year

	Notes	2021 £	2020 £
Other taxation and social security		2,766	2,766
Deferred income	17	14,831	14,690
Trade creditors		5,907	6,599
Other creditors		887	931
Accruals		5,052	5,494
		29,443	30,480

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2021

17 Deferred income

	2021 £	2020 £
Other deferred income	22,173	22,406
	<u>22,173</u>	<u>22,406</u>

Deferred income is included in the financial statements as follows:

	2021 £	2020 £
Current liabilities	14,831	14,690
Non-current liabilities	7,342	7,716
	<u>22,173</u>	<u>22,406</u>

18 Retirement benefit schemes

Defined contribution schemes

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently administered fund.

The charge to profit or loss in respect of defined contribution schemes was £7,759 (2020: £7637).

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2021

19 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 November 2019	Incoming Resources	Resources Expended	Balance at 1 November 2020	Incoming Resources	Resources Expended	Balance at 31 October 2021
	£	£	£	£	£	£	£
Esmee Fairbairn (Conservation Manager)	26,553	50,000	(47,419)	29,134	40,000	(47,235)	21,899
R Day (Finance Officer)	-	3,000	(2,500)	-	-	-	-
Jack Paterson Charitable Trust (TPP)	-	2,500	(2,500)	-	-	-	-
John and Ruth Howard Charitable Trust (TPP)	-	2,000	(2,000)	-	-	-	-
Topinambour Trust	-	4,000	(4,000)	-	4,000	(4,000)	-
Tanner Trust	-	2,000	(2,000)	-	2,000	(2,000)	-
William Dean Countryside Educational Trust	-	-	-	-	500	(500)	-
Heather Society	-	-	-	-	6,500	-	6,500
Persephone	-	-	-	-	1,286	-	1,286
West Midlands Shows Fund	1,000	-	-	1,000	-	-	1,000
	<u>27,553</u>	<u>63,500</u>	<u>(60,419)</u>	<u>30,134</u>	<u>54,286</u>	<u>(53,735)</u>	<u>30,685</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2021

19 Restricted funds

(Continued)

Directory - annual publication of National Plant Collections, their locations, contact details and other useful information

Threatened Plants Project - assesses plants threatened in cultivation, at cultivar, not species, level.

NCH Training - workshops and education materials for National Collection Holders

Plant Guardians - records threatened plants conserved by Plant Heritage members in their own gardens

Database - Updating the National Collections database.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2021

20 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:

	Movement in funds				Movement in funds				Balance at 31 October 2021
	Balance at 1 November 2019	Incoming Resources	Resources Expended	Transfers	Balance at 1 November 2020	Incoming Resources	Resources Expended	Transfers	
	£	£	£	£	£	£	£	£	£
Area Groups	236,881	46,453	(46,680)	(66,591)	170,063	67,958	(37,704)	(21,026)	179,291
Project fund	80,000	-	-	-	80,000	-	-	(80,000)	-
Office Move	-	-	-	-	-	-	-	15,000	15,000
CRM	-	-	-	-	-	-	-	30,000	30,000
Risk Reserve	-	-	-	-	-	-	-	60,000	60,000
	<u>316,881</u>	<u>46,453</u>	<u>(46,680)</u>	<u>(66,591)</u>	<u>250,063</u>	<u>67,958</u>	<u>(37,704)</u>	<u>3,974</u>	<u>284,291</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2021

20 Designated funds

(Continued)

Area Groups

Area Groups carry out activities throughout the year in accordance with the charity's objectives whilst remaining sympathetic and relevant to each group as defined by its members and geographical location. The Designated Fund represents the income and expenditure from group activities and the value retained in bank accounts as at the period end.

Project Fund

The Project Fund provides for spending on specific projects planned for the short to medium term.

Office Move

To fund the relocation costs associated with changing office.

CRM

To fund a new customer relationship management system.

Risk Reserve

For future operational shocks such as COVID.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2021

21 Analysis of net assets between funds

	National Office	Area Groups and Project Fund	Restricted Funds	Total	National Office	Area Groups and Project Fund	Restricted Funds	Total
	2021 £	2021 £	2021 £	2021 £	2020 £	2020 £	2020 £	2020 £
Fund balances at 31 October 2021 are represented by:								
Intangible fixed assets	77,930	-	-	77,930	48,726	-	-	48,726
Tangible assets	7,492	-	-	7,492	10,111	-	-	10,111
Current assets/(liabilities)	166,510	284,291	30,685	481,486	159,900	250,063	30,134	440,097
Long term liabilities	(7,342)	-	-	(7,342)	(7,716)	-	-	(7,716)
	<u>244,590</u>	<u>284,291</u>	<u>30,685</u>	<u>559,566</u>	<u>211,021</u>	<u>250,063</u>	<u>30,134</u>	<u>491,218</u>

PLANT HERITAGE

England & Wales - Charity number 1004009

Accounts



Report of the Trustees and Unaudited Financial Statements
for the Year ended 31 October 2020

Registered Charity No: 1004009/SC041785
Company Registered No 2222953

Patron His Royal Highness The Prince of Wales

President Alan Titchmarsh

Vice-Presidents

Lawrence Banks

Christopher Brickell

Jamie Compton

Lady Hamilton

Roy Lancaster

Sir Roy Strong

Trustees

Mrs C Bufton (Chairman)

Ms R Day (deceased 18.09.20)

Mrs C Penny

Mr J Marshall

Mr D Ross (resigned 01.04.20)

Ms E Crawforth

Ms S Nex

Mr D Ford (resigned 27.03.20)

Mr A Harris (resigned 19.10.20)

Ms H Triggs

Mr G Morgan (from 10.07.20)

Charity Number 1004009/SC041785

Company Number 2222953

Independent Examiner Frances Wilde FCCA DChA
Warner Wilde
Chartered Certified Accountants
4 Marigold Drive
Bisley
Surrey
GU24 9SF

Plant Heritage office
12 Home Farm, Loseley Park, Guildford, GU3 1HS
www.plantheritage.org.uk

	Page
Patron, Presidents and Trustees of the Charity*	2
Annual General Meeting 2021*	4
President's Remarks*	5
Chairman's Review*	6-8
Activities in 2019/20: What Plant Heritage does*	
Objectives and Achievements*	9-17
Treasurer's Financial Review*	18
Fundraising Activities*	19
Structure, Governance and Management*	20-22
Statement of Trustees' Responsibilities	24
Report of the Independent Examiner	25
Statement of Financial Activities	26-27
Balance Sheet	28-29
Notes to the Financial Statements	30-46
*These sections form part of the Trustee's Annual Report	

Annual General Meeting 2021

All members of Plant Heritage have been invited to meet members of the Board (who are Trustees of Plant Heritage) and ask questions on past performance and future plans at the 2021 Annual General Meeting which will be a virtual event on Saturday the 17th April.

Questions about anything contained in this report or the accompanying Financial Statements, should be addressed to the Chairman, by email to chairman@plantheritage.org.uk, or if that is not possible, by post to Plant Heritage, 12 Home Farm, Loseley Park, Guildford GU3 1HS, or telephone 01483 447540.

President's Remarks

March 2021

All too often we underestimate the importance of the plants that grow in our gardens, but the role of gardeners in conserving the botanical riches of planet earth has never been more vital. Without a doubt, those who are making the greatest difference are the holders of our National Plant Collections. These men and women devote a huge part of their lives to an individual group of plants, a particular person's horticultural legacy or a specific historical period. Do not make the mistake of thinking that they are all professional gardeners or botanists. They are not. They are simply active enthusiasts who are prepared to do their bit to nurture the plants in their care and ensure a comprehensive gene pool that can do much to safeguard the future wellbeing of our botanical heritage – plants that will feed us both physically and spiritually. Last year 35 new National Plant Collections were accredited, bringing the total to 666. It's a great achievement, but one which needs to continue to grow.

We need to retain as wide a range of different cultivated plants as possible so that the needs of gardeners and growers who come after us can be catered for. Once a particular variety has become extinct, it is almost impossible to bring it back, and this conservation and retention of characteristics is every bit as important in cultivated plants as in native species.

The differences inherent in new cultivars are not all related to aesthetic appearance. Some developments may increase pest or disease resistance or improve the ability of a plant to be self-supporting or grow in a wider range of soils and situations. Diseases such as sudden oak death or ash die-back can best be combatted through the discovery of disease resistant strains, so it stands to reason that the wider the gene-pool we possess the more likely such strains will be found and the better we will be placed to combat epidemics.

This last year has taught us a lot about human disease resistance; plants need it, too, if they - and we - are to survive. Plant Heritage is in the vanguard of ensuring that we safeguard our plant material with a view to a healthier future, and webinars, along with an online shop have opened new channels of information and supply. This year the emphasis will be on record keeping and expansion of the database. Oh, it might sound dull, but it's vital if information is to be readily available and easily accessed – as useful a national asset as the records of cooks in the British Library!

I'm delighted to be President of Plant Heritage and even more delighted that members continue to engage like-minded people in gardening and demonstrate the vital role gardeners can and must play in plant conservation and the health of the planet itself.

We are amazingly lucky to be surrounded by such a glorious diversity of plant material; we have a duty of care to hand on that collection to our children and grandchildren in good health and increasing variety. With your help we can do just that.

Alan Titchmarsh MBE VMH DL
President

Chairman's Review

Conserving the diversity of cultivated plants is essential to all our futures. The plants grown in National Plant Collections® or held by Plant Guardians® contain unique combinations of genetic material which are the legacy of generations of plant collectors and breeders who have built our nation's rich and unique horticultural landscape. The work of Plant Heritage spans four decades and in the light of climate change and an increasingly urban society, which values horticulture as important to its health and well-being, the charity's work is as important now as it was in the 1970s, when the charity's founders identified that a significant part of the nation's rich horticultural heritage was at risk of disappearing.

Our work is spearheaded by a network of National Collection Holders who come from all walks of life and live across the length and breadth of the British Isles. The beauty of the National Plant Collections is that anyone who has an interest, passion or expertise in a certain group of plants, whether amateur or professional can potentially become a collection holder. In doing so they curate and cultivate their own living collection which then forms part of the largest living collection of garden plants held outside botanical institutions in the UK.

Our National Collection Holders are supported by a dedicated Central Office team including three Plant Conservation specialists who provide technical support across the British Isles. This network is strengthened by our regional network of volunteer Collection Coordinators who regularly visit Collection Holders whilst also seeking out new and potential collections. All applications are then guided through the process by the Plant Conservation Committee. Members of this committee are independent advisers, experts in taxonomy, horticulture, botany and the horticultural trade and area group representatives, all volunteers who freely give their time to ensure National Plant Collections are maintained and looked after to a consistent standard.

The Threatened Plants Programme underpins our conservation work and is an ongoing research initiative which identifies plants threatened and worthy of conserving. The Plant Guardian® scheme encourages members to actively seek out and conserve individual plants. Plant Heritage's education objective is delivered by both our regional groups and the Central Office through a diverse range of events, shows, publications, workshops and other activities. In 2021, many of these were delivered virtually. As a charity, Plant Heritage is funded through membership subscriptions, donations from individuals and industry, sponsorship and donations from charitable trusts.

What are the threats to our garden plants?

Changing fashions

Changes in styles of planting and taste can cause groups of plants to go out of fashion. We don't want to lose the range of cultivars available for when they inevitably come back into fashion.

Changes to the plant sales trade

The requirement for plants to be of a specific size and in flower at the point of sale by garden centres and supermarkets can lead to a diminution of the range of plants grown in our gardens. We are also losing specialist plant nurseries who carry a much wider range of plants.

Climate change

Climate change over time will have a continuing effect on the range of cultivated plants available to the UK.

Pests and pathogens

Due to the nature of modern trade and travel there is an increasing risk of new pests and diseases being introduced to the UK. Recent examples of these include box blight, ash die-back, and agapanthus gall midge.

Loss of propagation or cultivation skills

A lack of horticultural skills, particularly in propagation, is causing a loss in the availability of specialist cultivated plants.

PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2020

The coronavirus pandemic changed many of the plans of the charity with most of the shows and fundraising activities of Groups and Central Office being cancelled. As of March 2021, one year after it started, the UK is still in lockdown and there is still no certainty about the impact on the future of the charity's activities and its ability to raise funds in 2021.

We are fortunate that our work to consolidate our finances in 2018/19 left us in a good position. In 2019/20, lockdown caused the cancellation of most of our usual fundraising activities, resulting in a significant reduction to our income. Our work to keep in touch with members with newsletters and talks helped to minimise membership losses. We acted to minimise our costs by taking advantage of the government furlough scheme for some of our staff. This meant that some of our conservation work was slowed down, but an "emergency" grant from Esmée Fairbairn helped greatly, enabling us to bring our conservation and membership staff back to work.

There were a number of changes to the Board in 2019/20, with David Ford, David Ross and Alastair Harris all standing down. We also lost Dr Rosemary Day, our Vice-Chair, who passed away in September. A new Treasurer, Gareth Morgan, joined in July 2020 and a new Trustee, Adrian Stones, joined in December 2020. Their appointments are being put to the membership for approval at the upcoming AGM.

The Conservation team have continued their work to support the establishment and development of National Plant Collections, and Plant Guardians. Some live workshops were held before the restrictions, on Plant Health, Library Research and Persephone and when necessary, the virtual format was used to add additional training and workshops for Persephone.

A new Threatened Plant of the Year competition was introduced, open to our members and specialist plant societies and exhibitors at RHS Hampton Court Palace Garden Festival. The aim of the competition was to highlight our work in cultivated plant conservation. This also became a virtual event with *Clematis montana* var. *rubens* 'Veitch' as the judges' winner and *Aeonium* 'Bronze Teacup' the winner of the public vote.

Creative thinking by both the Central Office and many Groups, brought new ways of holding talks, meetings and fundraising activities. The frequency of our e-newsletters increased, keeping our membership up to date with news and virtual webinars, focused on the expertise and knowledge of National Collection Holders, began in May 2020. The webinars widened access to our talks, with members from around the country joining national and local events – some for the first time as they are unable to attend events in person. They also provided an opportunity to introduce more people to Plant Heritage and to increase awareness of our work. Central Office was also able to support local groups to run their events virtually too.

Plans had been made for displays at many national shows, but as they were all cancelled, we produced a video display at the first Dibley's Virtual Flower Show and a video about 4 National Collection Holders for the RHS Virtual Chelsea Flower Show. To replace income lost from our Seed Shop at the RHS Hampton Court Palace Garden Festival, we developed an online Seed shop.

In April, we launched a "Think Local" campaign to support local nurseries and growers. With the cancellation of plant fairs, some of these businesses have struggled to sell their plants and we made the decision to assist those who normally support our fairs, by offering to list their details on our website so that members and others can find out where to buy plants. The idea was that those who do not yet have an online business could offer a phone or email and collect service, with payment made in advance and plants safely left in a position for collection.

In 2021 we planned a display in the Discovery Zone at RHS Chelsea Show showcasing the research of Collection Holders, (this was cancelled in 2020). Unfortunately, this has had to be postponed for another year. Our usual Plant Heritage zone at RHS Hampton Court Palace Garden Festival is also planned, to include a display of the Threatened Plant of the Year competition. We also plan to continue with virtual zoom talks, and virtual workshops.

PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2020

A major project for the year will be the rebuilding of our Persephone plant collection recording tool. Persephone has come a long way since its conception in 2013. It is now used by 166 National Collection Holders and contains 33,244 accessions. Data on Persephone is now being made available to the PCC to support applications for National Collections while (subject to permissions) allowing for a seamless transfer of data to another collection holder and/or Plant Heritage, when the collection holder gives up. Persephone has also been adapted for use by the Plant Guardians' scheme.

Plant Heritage is keen to secure the future of these records and make them more accessible. Over the next 12 months we will work to transfer the development and maintenance of the software to a commercial organisation, undertaking a substantial refresh to consolidate existing and new features.

Our Mission is to conserve the rich diversity of garden plants in the UK and Ireland but this would not be possible without the hard work undertaken by our staff, members, National Collection Holders, Groups and all who volunteer their time and expertise to support and spread the word of our pressing work. So, I would like to record the collective thanks of the whole Board to them all.

Cecilia Bufton

Chairman

Date 26 March 2021

Trustees Report – Objectives and Achievements

The Board, who are the Trustees of Plant Heritage (“the Charity”), present their annual report for the year ended 31 October 2020, prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity’s governing document, the small companies regime s419(2) Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended), the Charities Act 2011 and “Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)”.

Objectives:

Plant Heritage’s charitable purposes seek to

- promote the conservation of cultivated plants with a focus on endangered or rare garden plants
- encourage and carry out research into the cultivation of rare or endangered plants and related information
- encourage the education of the public in horticultural skills, particularly with regards to cultivated plant conservation
- encourage the introduction and the propagation of rare cultivated plants not represented in the UK, within the law

We aim to do this by:

- Conserving our horticultural heritage by keeping living examples of plants in the **National Plant Collections**[®] scheme which enables us to coordinate collections, ranging from cultivated and species, to historical, heritage and scientific
- Identifying cultivars at the highest risk of extinction, with the ambition that these can be conserved. We do this through our **Threatened Plants Programme**[™]
- Encouraging individuals to conserve individual plants in the **Plant Guardian**[®] scheme, a register of holders of rare and unusual plants
- Sharing rare plants with gardeners across the UK, through our annual **Plant Exchange**[™]
- Documenting and recording collections of rare plants. This is done by our National Collection Holders and Plant Guardians and in our publications such as the *Directory*, *The Journal*, and through our online plant recording database **Persephone**
- Increasing the variety of garden plants available for gardens in the UK through supporting and undertaking group propagation activities and plant sales
- Ensuring rare plants and collections are supported in perpetuity (for future generations)
- Supporting Plant Guardians and National Collection Holders in their conservation work
- Educating the public in the importance of our work
- Working in partnership with organisations that can support our objectives
- Raising **funds** to support this work

Achievements:

Our Conservation Work

Britain is a nation of gardeners, our long history of collecting, breeding and growing plants gives us a hugely diverse garden flora. Our nation's long history of gardeners, plant hunters and plant breeders have gifted us with an extraordinary range of plants, contributing to the approximately 400,000 taxa that are grown in the UK.

There are numerous charities supporting the conservation of nature and artefacts, but Plant Heritage is unique in its approach to conserving cherished garden plants.

As a result of a successful application to the Esmée Fairbairn Trust, Plant Heritage was awarded a three-year grant to employ a Conservation Manager, who started in January 2019. The grant is being used to further conservation work, with targets set for increasing the number and diversity of cultivated plants held in collections, improving curation standards and further expanding the network of effective Collection Coordinators.

Why do we do it?

Plants have always been selected and bred, whether for their beauty, flavour, scent or other reasons. This breeding involves an enormity of human effort and inventiveness that is wasted if the plants cease to be grown.

Climate change, the advance of new pests and diseases, loss of gardens, a diminishing nursery trade and lack of knowledge in the general population all conspire to reduce the diversity of our garden flora. If garden plants go, a tantalising slice of social, cultural and horticultural history dies with them.

We believe that cultivated plants deserve to be a target for conservation. Each one contains a unique combination of genetic material and is testament to human effort and inventiveness.

How do we do it?

National Plant Collections®

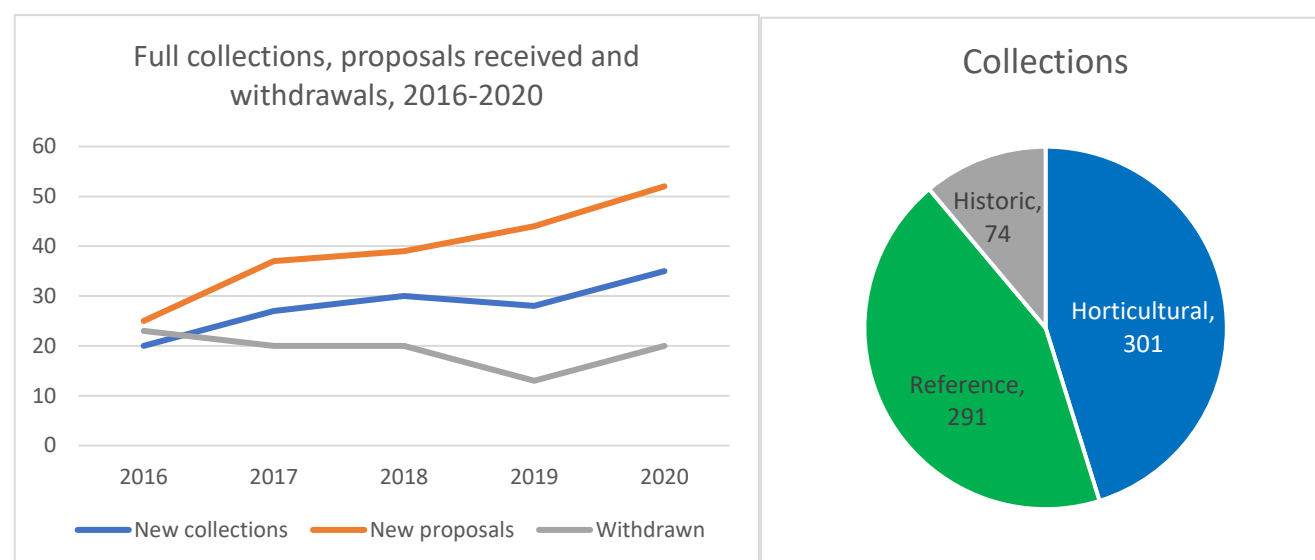
National Plant Collections are held by individuals or organisations who undertake to document, develop and conserve a comprehensive collection of plants within a defined scope and hold them in trust for the future. The scope can be defined botanically by plant group, either taxonomically, such as all the *Penstemon* cultivars or *Rhododendron* subsect. *Falconera*; or have a shared history such as plants collected by Harold Comber; or a geographic link, such as North West English cultivars.

Plant Heritage supports collectors, helping them to tend, monitor and share their collection, guaranteeing the preservation of our garden flora. Members of our groups all over the country, work together propagating plants and running plant exchanges and sales for funding. The groups also provide collection co-ordinators to advise the collectors and assess the collections.

The National Plant Collections scheme is overseen by the Plant Conservation Committee, a sub-

committee of the Board, whose members are independent advisers, experts in taxonomy, horticulture, botany and the horticultural trade and area group volunteers. The committee rigorously assesses new applications for scope and coverage.

There were 35 new National Plant Collections accredited in 2020, up from 28 in 2019. There has also been an increase from last year (18%) in new proposals. There were 666 Collections as of December 2020, of which 301 were Horticultural, 291 Reference and 74 Historic collections, with 18 having been awarded Scientific status.



National Plant Collections are made available for people to view, either by appointment, on special open days or as part of a garden open to the public. They contain about 95,000 plants, held across the 666 collections. Together this represents a huge resource for gardeners, nurserymen, garden designers, researchers, plant breeders and those interested in historical gardens and landscapes. Having these plants part of a registered conservation scheme ensures that they will be a resource for generations to come.

National Plant Collections are valuable for assessing the best cultivars for gardeners to enjoy and are used for scientific research, as a source of live plants and genetic material available for investigating a group of plants. They also provide insurance, being “living libraries” of the genetic diversity of garden plants. There are still some important groups of garden plants that are not represented in National Collections.

Missing genera campaign

The ‘Missing Genera’ campaign, launched in 2016, encourages people with a passion for plants to bring together a National Plant Collection of their own and join the Plant Heritage community in growing, sharing and saving plants.

From 2016 to 2020 we have highlighted 38 plant groups, five of these are now the subject of new National Plant Collections (*Achillea*, *Aeonium*, *Ginkgo*, *Alcea*, *Eryngium*) and we have received proposals for a further 14, which are currently working their way through the system (*Arisaema*, *Armeria*, *Cosmos*, *Caryopteris*, *Crateagus*, *Echinacea*, *Echinops*, *Forsythia*, *Grevillea*, *Hoya*,

Sisyrinchium, *Robinia*, *Tradescantia*, *Verbena*). This equates to a 38% response rate, or a 10% success rate on new National Collections accredited from this campaign.

Threatened Plants Programme

Fluctuating fashions, changes in the nursery trade, loss of specialist knowledge, environmental changes and new pests and diseases can all mean a threat to cultivated plants. As part of our work combating these threats, Plant Heritage started the Threatened Plants Programme (TPP) in 2009. Through the programme we track the locations and availability of garden cultivars and work out how rare or threatened they are. Information from the Threatened Plants Programme helps collection holders prioritise their sourcing and propagation. It is also a unique resource for people searching for particular cultivars, such as new Collection Holders. We can often pinpoint who last had a particular cultivar, or contact a garden still growing it to see if they can supply propagating material.

Using the process developed in 2019 for *Chrysanthemum* and *Delphinium*, an assessment was done in 2020 on camellias, at the request of a Collection Holder and for publication in the Rhododendron, Camellia and Magnolia Group's journal. The results were also shared with *Camellia* collection holders.

A summary of the findings for *Camellia*:

- 1,704 *Camellia* cultivars ever known to have been grown in the UK or Ireland were identified.
- 1,517 (89%) of these are still found growing, either in a National Plant Collection, other garden location, or in commerce. 855 (56%) of these are in at least one of the seven NPCs of *Camellia*.
- 868 (51%) are assessed as Threatened in Cultivation which means that they pre-date 2005, and are not (or only very intermittently) available commercially. 490 (56%) of these are in a National Plant Collection.
- Of the threatened cultivars, only 22% are growing at three or more locations.

These reviews have highlighted the need for consolidating the data held by the TPP, to allow for effective use by the conservation team. TPP reports for new applicants have been resumed.

Plant Guardians®

To preserve plants, it is essential that we keep them growing in gardens. Plant Heritage encourages members to take active part in conservation work by becoming a Plant Guardian. Through the scheme, rare plants are grown in multiple locations as an insurance against loss. Plant Heritage retains a record of plants in guardianship and encourages Plant Guardians to propagate the plants they are caring for and share them with other members via plant sales and the Plant Exchange.

We have 1,614 plants in the Plant Guardian scheme, an increase of 15%, despite not having the Plant Exchange, where about half of new registrations come from. Of these, 270 of the cultivars were highlighted by the TPP as "red label plants", threatened in cultivation.

Plant Exchange

The best way to conserve rare plants is to propagate and share them. The Plant Exchange enables hard to find plants being cultivated and conserved by members around the country to be shared with other members. By distributing plants around the country, we can re-establish plants in danger of being lost and give members the chance to get hold of something rare or unusual. We encourage members to propagate these plants and pass them on, to help secure their future.

The exchange was unable to take place in 2020 due to Covid19 restrictions. All offers and wants were held over to 2021.

Brickell Award

The Brickell award recognises the vital plant conservation work undertaken by Collection Holders to secure plants in cultivation, for example through the rediscovery and propagation of lost taxa and is awarded to those considered to have demonstrated excellence in this field.

The Brickell Award winner 2020 is Malcolm Pharoah for his work on *Astilbe*. This is in recognition for three decades of dedicated work in growing, researching and promoting this genus at Marwood Hill Gardens.

Digital Recording

It is important that we record the information gathered by National Collections Holders to create an enduring resource for the future. The use of the Persephone online recording system, which is the preferred method for recording the National Plant Collections, continued to grow with 180 current or archived Collections and a further 31 prospective collections recorded within it by the end of the year. All new applications are being added to Persephone and as of next year, all proposals for new collections are being supported with getting their records onto the system.

As of November 2020, there are over 33,000 accessions and a huge library of photographs and other information held on Persephone. Some collections recorded on Persephone have come to an end (due to death or other circumstances) but permission had been given by the Collection Holder for Plant Heritage to have continued access to the records. In the past, records had tended to get 'lost' with the collections. The Persephone volunteer team has recruited three new members to help support collection holders with accessioning and recording their collections.

A proposal has been developed for an upgrade to the database, in order to secure the long-term future of the project.

The Board would like to record its thanks to the whole working group for the hours they continue to give towards this project. Particular thanks are also due for support with software maintenance and development by Toby Ross which continues to be made available on a voluntary basis.

Support for Collections

In addition to our annual Plant Heritage bursary, awarded in Spring, we also awarded an extra round of bursaries in autumn, in recognition of the difficult year it has been for many. The money for this was raised through the programme of virtual talks.

In total, there have been 13 recipients of Plant Heritage bursaries in 2020, with projects ranging from installing rainwater irrigation, improving physical and online interpretation, improvements to visitor access, and protecting collections from the elements.

Workshops

Many of our regular workshops had to be put on hold. However, before the restrictions we were able to hold workshops on Plant Health, Library Research and Persephone. We have been running virtual training and workshops for Persephone.

Collection Coordinators

We currently have 38 Collection Coordinators and have gaps currently in 6 areas. Wales has been split into 3 areas and coordinators recruited for the South and Mid regions. We held a seminar for all Collection Coordinators in January 2020. This provided an opportunity for coordinators from all round the UK to meet, share knowledge and feed back to us about how best we can work together in their key role of visiting and supporting collection holders. This has been followed up with a redrafted Collections Coordinators handbook and a new facility on our collections database to allow coordinators to access directly the information we hold on collections they look after.

Policy Work

We continued our participation in the Orchards Network in 2019, along with representatives from a wide range of interested organisations such as the National Trust, RHS, local, regional and community orchards, National Fruit Collection (NFC) and Fruit ID (DNA research to establish varieties). Plant Heritage has participated in the UK Plant Genetic Resource group and has been in discussion on to contribute plant data on collections to their annual reporting on plant genetic resources in the UK.

Raising Public Awareness of the Need for Plant Conservation

By letting others know about what we do, we can gain their support for plant conservation so Plant Heritage is actively engaged in sharing expertise. We continue to produce our in-print publications as we increase our presence on social media and we exhibit at many local and national shows.

Membership and Volunteers

Based on data held on 1 November 2020 our Membership has decreased by 4.0 % to 3,328 (compared to a 2.5% decrease in 2019). Recruitment of new members would usually take place at shows and events, which has not been possible this year. We have 203 new members this year and have lost 343, considerably fewer than last year (407).

Members are usually encouraged to participate in the activities of their local group, of which there are 31 across the UK. These groups are run by volunteer committees who put in a tremendous amount of effort to organise interesting activities for their members and raise funds for the charity. As talks, plant fairs, visits and open days were cancelled this year effort was turned to keeping in touch with members, and to using virtual technology to provide online events.

Virtual webinars began in May 2020, with 12 webinars provided, open to all, with some free for our members. Around 50 members were trained in plant conservation skills over 3 workshops, before the national lockdown.

The Board is extremely grateful to each and every volunteer for the time and resources they give so generously to the charity. Their value comes from the skills, experience and support provided by them, whether it is the direct help they give to the staff, or the collections coordinators who play such an important role with the National Collection Holders. Volunteers are also vital to the success of all local group activities and provide the manpower needed to support activities such as shows and our seed shop.

Related Parties

The charity has two affiliated groups (Isle of Man and Guernsey) that share the same objectives as Plant Heritage, who generously support our work. The charity also has links with the Wiltshire Gardens Trust and the Irish Garden Plants Society.

Publications, Shows and Campaigns

Website

The new website has helped to promote and facilitate continued interest in Plant Heritage, particularly during the pandemic as most planned events were cancelled and a new virtual events programme instigated. From data over a comparable period there has been a 34% increase in users of the website. The website shop has seen increased activity during the year too.

Annual Directory

The annual Directory of National Plant Collections 2020 listed all National Plant Collections with details of the Collection Holder and information about when the Collection is open. This is issued free to members, but the information can also be accessed on our website so is freely available to the general public. We encourage members and the public to visit the National Collections to see for themselves the conservation efforts of the Collection Holders, and to see the wide range of plants that are being conserved. We thank all our National Collection Holders for opening their collections to the public. All collections are accessible to visitors whether by appointment, through specific open days, or business open days.

The Journal

We published two issues of The Journal with a continued focus on the work of Collection Holders undertaking conservation in action and how education in the widest sense is at the heart of what we do. We are grateful for the continuing work of our Editor Clare Hogan in delivering this publication.

E-newsletters

In 2020 we increased the frequency of our e-newsletters from 6 a year (3 focussed on member news and 3 focussed on news for Collection Holders) to monthly from March to October, to keep our membership up to date with news and events; and collection holders informed on legal, policy and regulatory matters.

Shows

Plans had been made for displays at RHS Chelsea Flower Show, Gardeners World Live show and RHS

Hampton Court Palace Garden Festival but they were all cancelled due to the pandemic. Instead of real shows we showed a video display at the first Dibley's Virtual Flower Show and produced a video about 4 National Collection Holders for the RHS Virtual Chelsea Flower Show.

Regional Shows and local plant fairs

Plans by local groups at regional shows were also cancelled, including the RHS Malvern Show (Spring & Autumn), normally attended by the Worcestershire Group; the Harrogate and the Yorkshire shows, normally attended by the Yorkshire Group; Gardeners World Live, normally attended by the West Midlands Group and the Shrewsbury Show normally attended by the Shropshire Group.

Local groups were unable to hold their usual plant fairs and most were therefore unable to raise funds from these for the charity this year. However, some local groups members were able to hold kerb side plant sales where conditions permitted raising some funds locally.

Seed Shop

The Plant Heritage Seed Shop usually features at the RHS Hampton Court Palace Garden Festival, but for 2020 an online shop was developed and set up by volunteers. This shop, linked to our main website, allowed us to raise some funds and maintain interest in Plant Heritage.

Threatened Plant of the Year Competition

A new Threatened Plant of the Year competition was introduced, held virtually due to the pandemic, and open to our members and specialist plant societies and exhibitors at RHS Hampton Court Palace Garden Festival. 12 entries were shortlisted and published on our website. *Clematis montana* var. *rubens* 'Veitch' was the judges' winner and *Aeonium* 'Bronze Teacup' was the winner of the public vote. This competition highlights our work in cultivated plant conservation.

Virtual talks programme

In lieu of the real events cancelled due to the pandemic a programme of virtual talks via Zoom were started in May 2020 focusing on the expertise and knowledge of National Collection Holders. Subjects covered a range of plant types from iris to peonies to clematis, plus subjects such as propagation. Twelve webinars were held over 6 months with 1,700 attendees, including 1,300 members, attending these talks. Most were open to all with some free for our members. The added benefit has been to introduce more people to Plant Heritage and to increase awareness of our work. In addition support was given to helping our local groups run their events virtually too.

Shows and talks plans for 2021

In 2021 we plan a display in the Discovery Zone at RHS Chelsea Show showcasing the research of Collection Holders (was cancelled in 2020). Our usual Plant Heritage zone at RHS Hampton Court Palace Garden Festival is also planned, to include a display of the Threatened Plant of the Year competition.

We also plan to continue with virtual zoom talks, and virtual workshops.

Social media

Our website www.plantheritage.org.uk continues to be the main way we provide online information about the National Plant Collections around the country, how to apply for a collection or register a Plant

Guardian, and also information about our 31 regional groups, affiliated groups and their activities.

Plant Heritage's social media presence is through Twitter, Facebook and Instagram. The wordpress blog is also still available. During the pandemic the activity on social media increased. Two new Facebook Groups were introduced, a Collection Holders' group and a members' group.

Instagram https://www.instagram.com/plantheritage/	2,300 followers
Facebook https://www.facebook.com/OurPlantHeritage	3,525 likes
Twitter https://twitter.com/plantheritage	15.1K followers

The Plant Heritage e-newsletters keep members and others informed of news and events and encourage the public to visit National Collections and get involved in conservation. Meanwhile Twitter, Instagram and Facebook continue to be used to engage the general public and horticulturalists through promoting an understanding of the diversity of garden plants and the need for conserving them.

Press coverage

Since November 2019, 141 items of media coverage about Plant Heritage have been achieved, with a total audience reach of 128 million. These include:

- 34 broadcast interviews
- Three national newspaper articles
- Nine regional newspaper articles
- 32 magazine features
- 63 online articles

Stories promoted since June 2019 include, The Missing Genera, which is Plant Heritage's best performing story achieving a double-page feature in The Daily Telegraph's gardening section as well as 12 broadcast interviews on 10 different BBC radio stations and two podcasts. It also featured in six regional newspapers, three magazine features, (Country Living, Country Life and Country Gardener) and 23 online articles, including Telegraph.co.uk.

Coverage for the Brickell Award included two interviews on BBC Radio Devon, four online articles including Hort Week, the RHS' Plant Review and local papers.

Interest in new National Plant Collections continues to generate interest with BBC Radio interviews articles in Hort Week online and RHS Garden News.

Treasurer's Financial Review

In a year that has been dramatically impacted by COVID-19, Plant Heritage has demonstrated financial resilience with overall income of £400,213 (£436,147 in 2019) and expenditure of £347,870 (£342,396 in 2019). The net surplus for the year was therefore £52,343 compared to a net surplus of £93,751 in 2019.

Incoming resources

2020 was another strong year for donations and legacies which at £177,889, as shown in note 3 to the Accounts, were 51% higher than in 2019 (£117,457). Donations and legacies income was aided by a generous £61,000 legacy received in the year. In the light of the COVID-19 pandemic it is inevitable that income from charitable activities (membership, shows, educational meetings and events) was down to £203,782 compared with £286,137 in 2019, a fall of 29% however we expect these to rebound once the COVID situation is behind us.

Resources expended

Plant Heritage spent a total of £347,870 (£342,396 in 2019) on charitable activities, fundraising and governance in 2020. This represents a 1% increase in resources expended and largely due to increased investment in plant conservation. The cost of generating funds was £44,444 (£45,392 in 2019).

Intangible fixed assets

Intangible fixed assets include the cost of the website development work.

Reserves policy

It is the policy of the Charity that unrestricted funds which have not been designated for a specific use, should be maintained at a level equivalent to six months general operating costs, including salaries. The Trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. This level of reserves has been maintained throughout the year and there are a further £250,063 of reserves designated towards specific purposes.

Fundraising Activities

Donations and Sponsorships

Plant Heritage is indebted to its supporters, sponsors and advertisers – we thank them all for their generous support and in particular:

Griffin Glasshouses
Johnsons Seeds
Melcourt Industries Ltd

Plant Heritage gratefully acknowledges grants and donations from the following charitable trusts and foundations, which help to support our core conservation work as well as the Threatened Plants Programme, National Collection Holder and membership workshops, the Plant Guardians scheme and our National Collection Holder's Conference. We are also delighted to welcome the support of three charitable trusts and foundations for the first time.

Sir Jeremiah Colman Gift Trust	Jack Patston Charitable Trust
Esmée Fairbairn Foundation	PF Charitable Trust
Goulburn Charitable Trust	C & SJ Smith Family Charitable Trust
Hawthorne Charitable Trust	Tanner Trust
John and Ruth Howard Charitable Trust	Topinambour Trust

We are grateful to the Esmée Fairbairn Foundation for an additional £25,000 emergency funding grant, which helped us return our staff from furlough and continue their conservation work.

Income from legacies

We received income from two legacies this year, from members that had passed away in 2019. We would like to express our gratitude to Elizabeth Bristow and Joan Tolley for helping us to save our cultivated plants for future generations.

Corporate Members

We launched our Corporate Membership Scheme at the end of November 2019 and are delighted to report that the following companies supported us by choosing to become Gold Corporate Members in 2020:

Barton Grange Garden Centre
Candide Ltd
Quinton Edwards
Shanly Homes

We are grateful for the continued support of our Bronze Corporate supporters:

Arboricultural Association	Horticultural Trades Association
Brother UK	Johnsons Seeds
Canonteign Falls	Melcourt Industries Ltd
Crafty Plants	National Trust Middlethorpe Hall
Floral Tours	Serenata Flowers
Griffin Glasshouses	Vital Earth

Transfers from Groups

Despite a very challenging year, we are grateful for the generosity and creativity of our groups, many of whom have managed to continue to engage with Plant Heritage members and raise funds for our work.

The charity recognises the commitment and hard work put in by the members of the area groups who fundraise throughout the year and generously pass these contributions on to support the core work of the charity. In all, Groups contributed a (loss)/profit of £(227) (£61,260 in 2019) to these accounts, and transferred £25,010 (£50,372 in 2019) to Central Office funds. Plant Heritage is also grateful to its affiliated groups in Guernsey and Manx, and the Wiltshire Gardens Trust who provide financial support.

Structure, Governance and Management

Plant Heritage is a company limited by guarantee and is governed by its Memorandum and Articles of Association, adopted on 2 February 1988, amended in April 2004, April 2010 and July 2018

Directors and Trustees

The Board of Trustees are responsible for the overall governance of the charity. The Trustees are also the Directors of the Limited Company. Trustees are appointed by the membership at the Annual General Meeting (AGM). At each AGM, one-third of the directors must retire from office. The directors to retire by rotation must be those who have been longest in office since their last appointment. A director must retire after serving a total of eight years, consecutive or otherwise.

The following served during the year 2019-2020:

Mrs Cecilia Bufton	Chairman (Ex Officio) Appointed 5 th October 2017, re-appointed 4 th May 2019
Dr Rosemary Day	Vice-Chairman (Ex Officio) Appointed 5 th October 2017, re-appointed 4 th May 2019 Deceased 18 September 2020
Mrs Catherine Penny	Appointed 5 October 2017, re-appointed 2 nd May 2020
Mr James Muir Marshall	Appointed 18 April 2018, re-appointed 2 nd May 2020
Mr David Ross	Resigned 1 st April 2020
Mrs Emma Crawforth	Appointed 26 th July 2018
Mrs Sally Nex	Appointed 26 th July 2018
Mr David Ford	Resigned 27 th March 2020
Mr Alastair Harris	Resigned 19 th October 2020
Ms Helen Triggs	Appointed 4 th May 2019
Mr Gareth Morgan	Appointed 10 th July 2020

The Board met formally on four occasions to discuss the management of the charity.

Governance changes

Plant Heritage held its 2020 AGM virtually and plans to do so again in 2021. Members are able to vote either in person during the meeting, by mail (email or post) or by proxy.

Panels, Committees and Working Groups

Finance Committee (FC) Replaced the Resources & Skills Panel (RSP) <i>Meetings every two months</i> Responsible for finance • Helen Moorcraft (Chair) • Gareth Morgan • Cecilia Bufton	Plant Conservation Panel (PCP) <i>Meetings four times a year</i> Development of Conservation Strategy and delivery of associated programmes and activities • Jim Marshall (Chair) • Catherine Penny • Simon Toomer • Tim Upson • Anne Tweddle • Ian Hunt • Rosie Yeomans • Catrina Fenton • Emma Robertson • Chris Clennett
Membership & Supporters Panel (MSP) <i>Meetings two-three times a year</i> Development of membership strategies and delivery of advice, support and guidance to Groups • Rosemary Day • Emma Crawforth • Penny Ross • Rosemary Buisseret • Maddy Ward • Linda Eggins • Rhona Frayne	
Persephone Working Group (PWG) <i>Meetings up to four times a year</i> • Doug Smith (Chair) • David Ross • Penny Ross • Barry Clarke • Gary Firth	Plant Conservation Committee (PCC) <i>Meetings four times a year</i> Accreditation of National Plant Collections • Tim Upson (Chair) • Jonathan Webster (Vice-Chairman) • Chris Clennett • James Armitage • Kevin Hobbs • Ross Kerby • Rosie Yeomans • Gary Firth • Matthew Biggs • Chris Trimmer
Governance & People Committee (G&PC) Governance, compliance, processes, policies and guidelines. Trustee appointments & HR issues <i>Meetings four times a year</i> • Emma Fontaine (Chair) • Margaret Headen • Helen Triggs • Adrian Stones • Jim Marshall	

Staffing

The headcount at the end of October 2020 was 5.71 (2019: 5.23) full time posts. The Board of Trustees wish to thank all the members of staff for their expertise, loyalty, resourcefulness and commitment to Saving Garden Plants.

Business Plan 2018 – 2021

Major areas of focus

Conservation- PCP & PCC

1. Increase the number and diversity of cultivated plants held in National Collections and by Plant Guardians
2. Improved curation standards that are consistent and comprehensive
3. A network of effective Collection Coordinators
4. Influence and guide future work in the field of conservation of cultivated plants

Membership & Supporters - MSP

5. Grow the membership of Plant Heritage
6. Develop programmes to raise funds from supporters
7. Improve and expand internal communication channels

Finance & Fundraising - FC

8. Oversee financial management
9. Develop a fundraising strategy to ensure Plant Heritage has sufficient income to achieve its charitable aims

Governance and Processes – G&PC

10. Review activities of panels, committees & working groups. Assess performance of member voting. Evaluate Central Office staffing against targets and objectives
11. Update Plant Heritage systems, processes and data management

External Communications – Communications WG

12. Define objectives for external communication and select appropriate partner for effective delivery

Statement of Trustees' Responsibilities

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 surplus or deficit for that period. In preparing these financial statements, the Trustees have in their opinion:

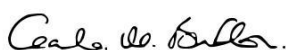
- selected suitable accounting policies and then applied them consistently;
- made judgements and estimates that are reasonable and prudent;
- ensured that the applicable accounting standards have been followed; and
- prepared the financial statements on the going concern basis.

The Trustees have been responsible for keeping proper accounting records which disclose, with reasonable accuracy at any time, the financial position of the charity and which have enabled them to ensure that the financial statements comply with the Companies Act 2006. They have also been responsible for the safeguarding of the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Statement of Disclosure of Information to Independent Examiner

So far as the Trustees are aware, there is no relevant information of which the Charity's Independent Examiner has not been informed.

Approved by the Board of Trustees on 15th April 2021 and signed on their behalf by:



Trustee and Chairman
Mrs Cecilia Bufton



Trustee and Treasurer
Mr Gareth Morgan

PLANT HERITAGE

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PLANT HERITAGE

I report to the trustees on my examination of the financial statements of Plant Heritage (the charity) for the year ended 31 October 2020.

Responsibilities and basis of report

As the trustees of the charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities and Trustee Investment (Scotland) Act 2005 (the 2005 Act), the Charities Accounts (Scotland) Regulations 2006 (as amended) and the Companies Act 2006 (the 2006 Act). You are satisfied that the financial statements of the charity are not required by charity or company law to be audited and have chosen instead to have an independent examination.

Having satisfied myself that the accounts of the charity are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the charity's accounts carried out under section 44 (1) (c) of the 2005 Act and section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed the requirements of Regulation 11 of the Charities Accounts (Scotland) Regulations 2006 (as amended) and all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

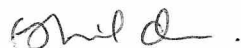
Independent examiner's statement

Since the charity is required by company law to prepare its accounts on an accruals basis and is registered as a charity in Scotland your examiner must be a member of a body listed in Regulation 11(2) of the Charities Accounts (Scotland) Regulations 2006 (as amended). I confirm that I am qualified to undertake the examination because I am a member of the Association of Chartered Certified Accountants, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act and Regulation 4 of the 2006 Accounts Regulations; or
- 2 the financial statements do not accord with those records; or
- 3 the financial statements do not comply with the accounting requirements of Regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended) and do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination; or
- 4 the financial statements have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the financial statements to be reached.



Frances Wilde FCCA DChA

Dated 16 April 2021

Warner Wilde
Chartered Certified Accountants
4 Marigold Drive
Bisley
Surrey, GU24 9SF

PLANT HERITAGE

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 OCTOBER 2020

		Unrestricted funds general 2020 £	Unrestricted funds designated 2020 £	Restricted funds 2020 £	Total 2020 £	Unrestricted funds general 2019 £	Unrestricted funds designated 2019 £	Restricted funds 2019 £	Total 2019 £
	Notes								
Income from:									
Donations and legacies	3	110,801	3,588	63,500	177,889	31,520	5,512	80,425	117,457
Charitable activities	4	164,396	39,386	-	203,782	164,105	122,032	-	286,137
Advertising, publications, sponsorship and trading	5	12,613	3,361	-	15,974	13,546	17,037	-	30,583
Investments	6	2,450	118	-	2,568	1,791	179	-	1,970
Total income		290,260	46,453	63,500	400,213	210,962	144,760	80,425	436,147
Expenditure on:									
<u>Raising funds</u>									
Costs of generating donations and legacies	7	43,678	-	-	43,678	43,969	-	-	43,969
Trading costs	7	766	-	-	766	1,423	-	-	1,423
		44,444	-	-	44,444	45,392	-	-	45,392
<u>Charitable activities</u>									
Membership and Shows	8	29,248	-	9,285	38,533	29,414	-	24,053	53,467
Educational Activities	8	58,830	40,421	-	99,251	30,320	79,213	-	109,533
Plant Conservation	8	107,749	6,259	51,634	165,642	95,831	4,287	33,805	133,923
Fit for Growth	8	-	-	-	-	81	-	-	81
Total charitable expenditure		195,827	46,680	60,919	303,426	155,646	83,500	57,858	297,004
Total resources expended		240,271	46,680	60,919	347,870	201,038	83,500	57,858	342,396

PLANT HERITAGE

STATEMENT OF FINANCIAL ACTIVITIES (CONTINUED) INCLUDING INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 OCTOBER 2020

Net incoming resources before transfers	49,989	(227)	2,581	52,343	9,924	61,260	22,567	93,751
Gross transfers between funds	66,591	(66,591)	-	-	-	-	-	-
Net income for the year/ Net movement in funds	116,580	(66,818)	2,581	52,343	9,924	61,260	22,567	93,751
Fund balances at 1 November 2019	94,441	316,881	27,553	438,875	84,517	255,621	4,986	345,124
Fund balances at 31 October 2020	<u>211,021</u>	<u>250,063</u>	<u>30,134</u>	<u>491,218</u>	<u>94,441</u>	<u>316,881</u>	<u>27,553</u>	<u>438,875</u>

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.

PLANT HERITAGE

BALANCE SHEET

AS AT 31 OCTOBER 2020

	Notes	2020 £	£	2019 £	£
Fixed assets					
Intangible assets	13		48,726		52,566
Tangible assets	14		10,111		3,937
			<u>58,837</u>		<u>56,503</u>
Current assets					
Debtors	15	14,470		6,945	
Cash at bank and in hand		456,107		406,539	
		<u>470,577</u>		<u>413,484</u>	
Creditors: amounts falling due within one year	16	(30,480)		(21,499)	
Net current assets			440,097		391,985
Total assets less current liabilities			<u>498,934</u>		<u>448,488</u>
Creditors: amounts falling due after more than one year					
Deferred income	17	7,716	(7,716)	9,613	(9,613)
Net assets			<u>491,218</u>		<u>438,875</u>
Income funds					
Restricted funds	19		30,134		27,553
<u>Unrestricted funds</u>					
Designated funds	20	250,063		316,881	
General unrestricted funds		211,021		94,441	
		<u>461,084</u>		<u>411,322</u>	
			<u>491,218</u>		<u>438,875</u>

PLANT HERITAGE

BALANCE SHEET (CONTINUED)

AS AT 31 OCTOBER 2020

	Notes	2020 £	£	2019 £	£
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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 October 2020.

The trustees acknowledge their responsibilities for ensuring that the charity keeps accounting records which comply with section 386 of the Act and for preparing financial statements which give a true and fair view of the state of affairs of the company as at the end of the financial year and of its incoming resources and application of resources, including its income and expenditure, for the financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the company.

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 15th April 2021



Mr G Morgan
Trustee

Company Registration No. 2222953

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 OCTOBER 2020

1 Accounting policies

Charity information

Plant Heritage is a private company limited by guarantee incorporated in England and Wales. The registered office is 12 Home Farm, Loseley Park, Guildford, Surrey, GU3 1HS.

1.1 Accounting convention

The financial statements have been prepared in accordance with the charity's governing document, the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) 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)". 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 applying FRS 102 Update Bulletin 1 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, modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value. 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.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

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.

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.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

1 Accounting policies

(Continued)

1.5 Expenditure

A liability is recognised when either a constructive or legal obligation is identified. Central costs are apportioned between costs of generating funds and charitable activities on the basis of the specific activities of members of staff. Irrecoverable VAT is allocated to the same expenditure heading as the cost to which it relates. Basic financial liabilities are recognised at transaction cost.

1.6 Intangible fixed assets other than goodwill

Intangible assets acquired separately from a business are recognised at cost and are subsequently measured at cost less accumulated amortisation and accumulated impairment losses.

Intangible assets acquired on business combinations are recognised separately from goodwill at the acquisition date where it is probable that the expected future economic benefits that are attributable to the asset will flow to the entity and the fair value of the asset can be measured reliably; the intangible asset arises from contractual or other legal rights; and the intangible asset is separable from the entity.

Amortisation 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:

Website	8 Years Straight Line
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1.7 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	4 years Straight Line
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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 net income/(expenditure) for the year.

1.8 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

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.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

1 Accounting policies

(Continued)

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.

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.11 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

1.12 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

1.13 Leases

Rentals payable under operating leases, including any lease incentives received, are charged as an expense on a straight line basis over the term of the relevant lease.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) *FOR THE YEAR ENDED 31 OCTOBER 2020*

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

3 Donations and legacies

	Unrestricted funds general 2020	Unrestricted funds designated 2020	Restricted funds 2020	Total 2020	Unrestricted funds general 2019	Unrestricted funds designated 2019	Restricted funds 2019	Total 2019
	£	£	£	£	£	£	£	£
Donations and gifts	38,488	3,588	63,500	105,576	31,520	5,512	80,425	117,457
Legacies receivable	61,000	-	-	61,000	-	-	-	-
Coronavirus Job Retention Scheme	11,313	-	-	11,313	-	-	-	-
	<u>110,801</u>	<u>3,588</u>	<u>63,500</u>	<u>177,889</u>	<u>31,520</u>	<u>5,512</u>	<u>80,425</u>	<u>117,457</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

4 Charitable activities

	Membership and Shows 2020 £	Educational Meetings and Events held by Area Groups 2020 £	Total 2020 £	Membership and Shows 2019 £	Educational Meetings and Events held by Area Groups 2019 £	Total 2019 £
Sales within charitable activities	156,388	47,394	203,782	162,709	123,428	286,137
Analysis by fund						
Unrestricted funds - general	156,388	8,008	164,396	162,709	1,396	164,105
Unrestricted funds - designated	-	39,386	39,386	-	122,032	122,032
	156,388	47,394	203,782	162,709	123,428	286,137

5 Advertising, publications, sponsorship and trading

	Unrestricted funds general 2020 £	Unrestricted funds designated 2020 £	Total 2020 £	Unrestricted funds general 2019 £	Unrestricted funds designated 2019 £	Total 2019 £
Advertising, publications, sponsorship and trading income	12,613	-	12,613	13,546	-	13,546
Fundraising events	-	3,361	3,361	-	17,037	17,037
Advertising, publications, sponsorship and trading	12,613	3,361	15,974	13,546	17,037	30,583

6 Investments

	Unrestricted funds general 2020 £	Unrestricted funds designated 2020 £	Total 2020 £	Unrestricted funds general 2019 £	Unrestricted funds designated 2019 £	Total 2019 £
Interest receivable	2,450	118	2,568	1,791	179	1,970

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

7 Raising funds

	Unrestricted funds general 2020 £	Unrestricted funds general 2019 £
<u>Costs of generating donations and legacies</u>		
Staging fundraising events	189	418
Staff costs	29,610	30,834
Depreciation and impairment	1,588	924
Support costs	12,291	11,793
Costs of generating donations and legacies	43,678	43,969
<u>Trading costs</u>		
Support costs	766	1,423
	44,444	45,392

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2020

8 Charitable activities													
	Membership Educational and Shows		Activities Conservation		Total Membership Educational and Shows		Activities Conservation		Plant		Fit for Growth		Total
	2020	2020	2020	2020	2019	2019	2019	2019	2019	2019	2019	2019	
	£	£	£	£	£	£	£	£	£	£	£	£	
Staff costs	20,135	15,677	84,398	120,210	34,713	-	77,947	-	112,660				
Depreciation and impairment	1,215	1,215	5,325	7,755	1,131	-	2,337	-	3,468				
Other charitable expenditure	913	71,673	10,824	83,410	3,180	109,533	7,238	81	120,032				
	22,263	88,565	100,547	211,375	39,024	109,533	87,522	81	236,160				
Grant funding of activities (see note 9)	-	701	10,815	11,516	-	-	8,428	-	8,428				
Share of support costs (see note 10)	15,684	9,399	51,710	76,793	12,451	-	34,376	-	46,827				
Share of governance costs (see note 10)	586	586	2,570	3,742	1,992	-	3,597	-	5,589				
	38,533	99,251	165,642	303,426	53,467	109,533	133,923	81	297,004				
Analysis by fund													
Unrestricted funds - general	29,248	58,830	107,749	195,827	29,414	30,320	95,831	81	155,646				
Unrestricted funds - designated	-	40,421	6,259	46,680	-	79,213	4,287	-	83,500				
Restricted funds	9,285	-	51,634	60,919	24,053	-	33,805	-	57,858				
	38,533	99,251	165,642	303,426	53,467	109,533	133,923	81	297,004				

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

9 Grants payable

	Educational Activities 2020 £	Plant Conservation 2020 £	Plant Conservation 2019 £
Grants to institutions:			
Other	-	10,815	8,428
	-	10,815	8,428
Grants to individuals	701	-	-
	701	10,815	8,428

10 Support costs

	Support costs £	Governance costs £	2020 £	Support costs £	Governance costs £	2019 £
Office running costs	89,083	-	89,083	58,620	-	58,620
Independent Examination and Accounts Preparation	-	3,797	3,797	-	3,618	3,618
Other governance costs including meetings and travelling	-	712	712	-	3,394	3,394
	89,083	4,509	93,592	58,620	7,012	65,632
Analysed between						
Fundraising	12,291	766	13,057	11,793	1,423	13,216
Trading	-	766	766	-	1,423	1,423
Charitable activities	76,792	3,743	80,535	46,827	5,589	52,416
	89,083	4,509	93,592	58,620	7,012	65,632

Support costs 'office running costs' includes administrative staff costs.

11 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year, but two (2019: five) of them incurred £486 (2019: £6,907) travelling expenses of which nil (2019: £4,805) was donated back to the charity.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

12 Employees

Number of employees

The average monthly number of employees during the year was:

	2020 Number	2019 Number
Fundraising	1	1
Plant Conservation	3	3
Membership	1	2
Finance and admin	1	-
	<u>6</u>	<u>6</u>

Employment costs

	2020 £	2019 £
Wages and salaries	152,732	132,239
Social security costs	7,687	5,695
Other pension costs	7,637	5,560
	<u>168,056</u>	<u>143,494</u>

8 (2019: 7) part time employees equate to 5.7 (2019: 5.2) full time staff.

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

13 Intangible fixed assets

	Website £
Cost	
At 1 November 2019	56,158
Additions - internally developed	3,180
	<u>59,338</u>
At 31 October 2020	
Amortisation and impairment	
At 1 November 2019	3,592
Amortisation charged for the year	7,020
	<u>10,612</u>
At 31 October 2020	
Carrying amount	
At 31 October 2020	<u>48,726</u>
At 31 October 2019	<u>52,566</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

14 Tangible fixed assets

	Computers £
Cost	
At 1 November 2019	4,736
Additions	8,497
	<u>13,233</u>
At 31 October 2020	<u>13,233</u>
Depreciation and impairment	
At 1 November 2019	799
Depreciation charged in the year	2,323
	<u>3,122</u>
At 31 October 2020	<u>3,122</u>
Carrying amount	
At 31 October 2020	<u>10,111</u>
At 31 October 2019	<u>3,937</u>

15 Debtors

	2020 £	2019 £
Amounts falling due within one year:		
Trade debtors	5,740	5,442
Other debtors	3,527	786
Prepayments and accrued income	5,203	717
	<u>14,470</u>	<u>6,945</u>

16 Creditors: amounts falling due within one year

	2020 £	2019 £
	Notes	
Other taxation and social security	2,766	2,480
Deferred income	17 14,690	14,580
Trade creditors	6,599	1,456
Other creditors	931	125
Accruals	5,494	2,858
	<u>30,480</u>	<u>21,499</u>

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

17 Deferred income

	2020 £	2019 £
Other deferred income	22,406	24,193
	<u>22,406</u>	<u>24,193</u>

Deferred income is included in the financial statements as follows:

	2020 £	2019 £
Current liabilities	14,690	14,580
Non-current liabilities	7,716	9,613
	<u>22,406</u>	<u>24,193</u>

18 Retirement benefit schemes

Defined contribution schemes

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently administered fund.

The charge to profit or loss in respect of defined contribution schemes was £6,801 (2019: £5,560).

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2020

19 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:

	Balance at 1 November 2018	Movement in funds		Balance at 1 November 2019	Movement in funds		Balance at 31 October 2020
	£	Incoming Resources	Resources Expended	£	Incoming Resources	Resources Expended	£
Esmee Fairbairn (Conservation Manager)	-	57,531	(30,978)	26,553	50,000	(47,419)	29,134
Ridley Family Charity (Plant Health Workshop)	739	-	(739)	-	-	-	-
Hugh Fraser Foundation (Collection Holders Conference)	1,000	-	(1,000)	-	-	-	-
Cruach Trust (Collection Holders Conference)	973	-	(973)	-	-	-	-
RHS Coke Trust (Workshops)	854	-	(854)	-	-	-	-
Edward and Dorothy Cadbury Trust (Midlands)	500	-	(500)	-	-	-	-
Alfred Williams Charitable Trust (Plant Conservation Suffolk)	500	-	(500)	-	-	-	-
Godington Charitable Trust (Kent Group)	140	-	(140)	-	-	-	-
Cheshire Group	250	-	(250)	-	-	-	-
Herts and Bedfordshire Group	30	-	(30)	-	-	-	-
Rothermere Trust	-	5,000	(5,000)	-	-	-	-
Banister Charitable Trust	-	5,000	(5,000)	-	-	-	-
Topinambour Trust	-	4,000	(4,000)	-	4,000	(4,000)	-
Tanner Trust	-	2,000	(2,000)	-	2,000	(2,000)	-
Stanley Smith	-	2,000	(2,000)	-	-	-	-
The Misses Barrie Charitable Trust	-	1,000	(1,000)	-	-	-	-
Shanley Homes (TPP)	-	1,000	(1,000)	-	-	-	-
Finnis Scot Foundation	-	894	(894)	-	-	-	-
Leach 14 Trust/William Dean Trust (£500 each)	-	1,000	(1,000)	-	-	-	-
West Midlands Shows Fund	-	1,000	-	1,000	-	-	1,000
R Day (Finance Officer)	-	-	-	-	3,000	(2,500)	-
Jack Patston Charitable Trust (TPP)	-	-	-	-	2,500	(2,500)	-
John and Ruth Howard Charitable Trust (TPP)	-	-	-	-	2,000	(2,000)	-

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2020

19 Restricted funds	(Continued)
4,986 80,425 (57,858) 27,553 63,500 (60,419) 30,134	
Directory - annual publication of National Plant Collections, their locations, contact details and other useful information	
Threatened Plants Project - assesses plants threatened in cultivation, at cultivar, not species, level.	
NCH Training - workshops and education materials for National Collection Holders	
Plant Guardians - records threatened plants conserved by Plant Heritage members in their own gardens	
Database - Updating the National Collections database.	

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

20 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 November 2018	Movement in funds		Balance at 1 November 2019	Movement in funds		Transfers	Balance at 31 October 2020
	£	Incoming Resources	Resources Expended	£	Incoming Resources	Resources Expended	£	£
Area Groups	175,621	144,760	(83,500)	236,881	46,453	(46,680)	(66,591)	170,063
Project fund	80,000	-	-	80,000	-	-	-	80,000
	<u>255,621</u>	<u>144,760</u>	<u>(83,500)</u>	<u>316,881</u>	<u>46,453</u>	<u>(46,680)</u>	<u>(66,591)</u>	<u>250,063</u>

Area Groups

Area Groups carry out activities throughout the year in accordance with the charity's objectives whilst remaining sympathetic and relevant to each group as defined by its members and geographical location. The Designated Fund represents the income and expenditure from group activities and the value retained in bank accounts as at the period end.

Project Fund

The Project Fund provides for spending on specific projects planned for the short to medium term.

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

21	Analysis of net assets between funds	National Office Groups and Project Fund		Restricted Funds		Total		National Area Groups and Project Fund		Restricted Funds		Total	
		2020	2020	2020	2020	2020	2020	2019	2019	2019	2019	2019	2019
		£	£	£	£	£	£	£	£	£	£	£	£
	Fund balances at 31 October 2020 are represented by:												
	Intangible fixed assets	48,726	-	-	-	48,726	52,566	-	-	-	-	52,566	
	Tangible assets	10,111	-	-	-	10,111	3,937	-	-	-	-	3,937	
	Current assets/(liabilities)	159,900	250,063	30,134	440,097	47,551	47,551	316,881	27,553	391,985			
	Long term liabilities	(7,716)	-	-	(7,716)	(9,613)	(9,613)	-	-	(9,613)			
		211,021	250,063	30,134	491,218	94,441	316,881	27,553	438,875				

PLANT HERITAGE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2020

22 Operating lease commitments

At the reporting end date the charity had outstanding commitments for future minimum lease payments under non-cancellable operating leases, which fall due as follows:

	2020 £	2019 £
Between two and five years	-	38,819