

Trustee's Report on the year 2020, to the 2021 AGM

The report this year starts with a message from Jason O'Keefe, who, after many years as a Trustee and Chair of the Society, has recently stood down from both roles:

As I sit here writing what will be my last report, I reflect on what has been an incredible time with the Society. I took over when the Society had a little over 100 members, a few very good events during the year and a drive to move us forward and spread the word of "Mortimer" to all those that would listen. Today, we have approaching 450 members worldwide, we have increased the number of events throughout the year and widened our remit to give us greater scope to study the medieval world in more detail, as well as the Mortimers and the Welsh Marches. Books, publications and occasional papers have been produced and are very well received; a well thought of and respected yearly Essay Prize; work with local schools as part of their Key Stage One and Two learning about their local medieval history; and, even Covid couldn't dampen our spirits as we moved our talks online allowing more members to take part in our events.

All of this would not have been possible without the continued support of you the members of the society and the hard work of the Trustees both past and present and it is to you all that I say thank you for your support and commitment and I wish the Society continued growth and I can only see great things for the future!

I'm sure I will see you at an event in the future and I will be continuing my work with YouTube and making sure our talks are available for all.

The Trustees and members of the Society give great thanks to Jason for his dedication to the Society. Three other Trustees have also stood down due to pressure of their work commitments – Andrew Colby, Stanton Stephens, and Jean de Russet – and we thank them also for everything that they have done for the society.

Although 2020 took a totally unexpected course, after the initial pause caused by the first lockdown, the Society found ways to operate in the exceptional circumstances, continuing to serve members and to foster wider interest in the Mortimers and the Welsh Marches. As usual, we have organised the report under the key objectives of the Society

- 1 *Fostering an academic and practical appreciation of the local, national and international history associated with the Mortimer family, and similar medieval Marcher families.*

The lockdowns and associated restrictions on social gatherings that started in March 2020 meant that all the events at which we would normally gather to promote interest in the Mortimers and the Welsh Marcher Lordships didn't happen. The MHS rightly has a reputation as a vibrant and dynamic society and the challenge was to maintain as much as possible through virtual online approaches. We are fortunate to have the solid base of an excellent website and our brilliant quarterly magazine, Mortimer Matters. Both went from strength to strength, with one scholar commenting that Mortimer Matters is the best history society magazine that she reads.

With great support from our extensive networks, we organised a series of historical quizzes that both entertained and challenged members to use online resources to discover new information. The quizzes were quickly circulated online by other societies which helped to promote interest in the Mortimers and the Welsh Marches as well as raising the profile of the Society.

As reported below, when it became clear that in-person events would not happen during 2020 (and, indeed, for much longer) the MHS became one of the first societies to hold its conferences and talks online. One benefit of the events being online was that they became accessible to people living further away. Consequently, we extended our publicity to other historical societies across the Marches and Wales, which resulted in a higher profile for the Society and larger attendance at the online events. In turn, this fed into increased membership. Inevitably, there was a lull in new membership during the summer, but once the online events started there was a significant increase in new members. Similarly, with events being held online, our Twitter and Facebook feeds generated more responses. We can confidently say that more people are now becoming aware of the Mortimer History Society, the Mortimers and the fascinating history of the Welsh Marcher Lordships.

2 *Studying the archaeology, structural fabric, heraldry, artefacts and documents related to the Mortimer family, and similar medieval Marcher families.*

During 2019 and the first part of 2020, we had been working to establish a Research Group of members who were interested in learning the skills of palaeography to transcribe and translate medieval records. Whilst there was 20+ interested in participating, and who attended a second training course in February, the development of the group was held back by the difficulties involved in arranging meetings given the geographical spread. After the initial lull of the summer, Zoom has enabled the group to flourish. They now meet every two to three weeks to transcribe and translate, with the expert guidance and tuition of our President, Dr Paul Dryburgh and Dr Helen Watts, documents that have been previously circulated.

In October, Logaston Press published *Decorated in Glory: Church Building in Fourteenth Century Herefordshire* by Professor Nigel Saul. Professor Saul developed the material for the book from the lecture that he gave to the Society in May 2018. Trustees liaised with Logaston Press to secure their agreement to publish, and approved a contribution to the publication costs, thus the book was published as '*the first in a series of publications for the Mortimer History Society*'. Launched at our online conference in November, the book has been tremendously successful, being sold out after just a few months – a re-print was quickly arranged by Logaston.

3 *Working with schools, communities, colleges and universities to promote, sustain and increase individual and collective knowledge and understanding of the contribution of the medieval Mortimer family to the history and culture of the*

British Isles, and also of the history, economy, society and culture of the medieval Marches of Wales.

The school closures in the spring and early summer, with only limited numbers of pupils then returning to school, plus the restrictions on social gatherings, stopped completely our work with local primary schools. By the end of 2019, it had built up to 14 schools being involved. We have been keeping in contact with the schools and, hopefully, once everything returns to normal, we will be able to resume the momentum.

The complete lockdown in March disrupted our plans to launch the 2020 Essay Prize. It was eventually launched in the summer with the closing date extended to 1st March 2021 to allow time for scholars to research their subjects and for access to libraries and archives to open up.

4 *Developing greater knowledge of the Mortimer family and medieval life in the Marches of Wales through the promotion of local and national research and its dissemination through conferences, lectures and publications.*

The 2019, 3rd volume of the MHS Journal, which was published shortly before lockdown, contains the winning entry from the 2018 Essay prize competition along with articles, reviews and lots of interesting material to read. Thank you to Dr Paul Dryburgh for all his editorial work!

The first event that had been planned for 2020 was in February, so was able to happen; though, the torrential rain on the morning and throughout the day, led to the dramatic floods in Shropshire and Herefordshire. Held at Moor Park School near Ludlow '*Kings, Lords, Soldiers and Horses-the reality of medieval warfare*' was well attended by 100 people (despite the weather!), with over 30 people also booking in for the afternoon session where they had the opportunity to have a go at archery (thanks to The Archers of Teme) and listen to short talks on the use of the longbow and the crossbow.

The AGM planned for March, in Weobley, had to be cancelled; our eagerly anticipated joint conference with the Radnorshire Society scheduled for May was postponed to May 2021 (now postponed to May 2022); the Summer Lecture in June, and the Study Visit in July were also postponed.

By mid-summer, when it was becoming clear that there was no likelihood of events resuming in 2020 (and probably for some time into 2021), Trustees began to work out how we could start an online programme of talks and conferences. One of our members, Connor Williams, very kindly offered to give an online talk about his research to enable us to trial the use of Zoom and the intricacies of screen sharing before embarking on larger events.

Our conference that had been planned for October, '*The King's Writ does not run here: The Medieval Welsh Marcher Lordships*', was adjusted to be a half day online conference (our feeling is that three talks in a morning or afternoon is a better format for a purely online event as a full day could be too much screen time. As mentioned earlier, an online event enabled us to reach a much wider

audience through publicity to other history societies, Twitter and Facebook, which resulted in an audience of well over 100 and a number of new members.

We were, therefore, very confident that the half day conference planned for November, *'Decorated in Glory: Churches, Church buildings and people in Herefordshire in the C14th'*, would also be successful. As mentioned above, this event was the launch of the book by Professor Nigel Saul, and we again welcomed well over 100 people.

Publication of the first volume in the series of books on the Welsh Marcher Lordships, which had been due in 2020, was delayed by the pandemic as lockdowns, isolation and home-schooling took its toll on publisher and printer. The Welsh Marcher Lordships I: Central and North was finally published in March 2021, as the second in the series of publications for the MHS, and has been extremely well received (indeed, it sold out in 5 months and is being reprinted already).

5 *Plans for 2021*

By the latter end of 2020, it was becoming clear that the restrictions on social gatherings would continue for some time into 2021, so plans were put in place for the programme to continue online with half-day conferences in February (*"Cherchez La Femme": Queenship, Law & Marriage in Medieval Wales & its March* – attended by over 200 people), and March (*Three Suns were seen in the firmament: the battle of Mortimer's Cross 1461* – attended by approaching 300 people). The joint conference with the Radnorshire Society was postponed (again) to May 2022 – surely, it will be third time lucky; it was replaced with an online conference exploring aspects of the reign of Edward I. Similarly, plans had to be made for the annual Summer lecture to be online.

With circumstances improving, we became confident that the Study Trip to Hellens, Much Marcle and Kempley that had been postponed from 2020, could actually happen in August. It duly has and was enjoyed by 25 people.

It is looking very hopeful that the conference scheduled for 2nd October in Evesham, which has been jointly organised with the Simon de Montfort Society and the Vale of Evesham Historical Society, will be able to happen as planned. Titled, *'The Murder of Evesham, for battle it was none': the Second Barons' War and the battle of Evesham (1258-66)*, it promises to be an excellent event with speakers who are some of the leading scholars of thirteenth century England.

Many members have said that they enjoyed the online events because it didn't involve travel and they could see the speakers' slides more clearly. Consequently, we will trial live Zooming the 2nd October conference, and also the Trustees have decided that it makes sense for the two winter half-day conferences in November and February to, certainly be online only events this winter, and probably in future years. Thus, in November the final event in the 2021 programme will be a half-day online conference: *'The House of Magnificence': aspects of the kingship of Edward III*.

The Trustees' report to the 2022 AGM will include full information about the 2022 programme.

During 2020 planning started for fascinating new developments:

- We decided to sponsor a strand, consisting of two sessions of three talks in each, at the Leeds International Medieval Congress in July 2021, which is the largest event for medieval historians. In this case, sponsoring means organising the sessions rather than financial sponsorship, though we did make available bursaries for any of our speakers who were unable to obtain other funding. Six scholars, all members of the Mortimer History Society, gave excellent papers, which were well received. Our involvement significantly increased the profile of the MHS, and we have agreed to organise four 3-speaker sessions at the 2022 Congress.
- As everyone will know (!) 1st August 2023 will be the 700th anniversary of the escape from the Tower of London by Roger Mortimer. During 2020, we agreed two exciting projects to commemorate this event: facilities have been booked at the Tower of London to host a conference on that date; we have commissioned twelve scholars, most of whom are MHS members, to write new essays on aspects of the Mortimers for a book that will be edited by Paul Dryburgh and Philip Hume, and which will be published by Logaston Press in time to be launched at the event at the Tower of London.
- The downtime forced by the lockdowns was used to start planning a new website as the old one had become very creaky behind the scenes, with the new one being launched earlier in the year. Everyone agrees that it is a tremendous improvement.
- With the publication of vol I of the Marcher Lordships deferred to March 2021, it was agreed that vol II would be published in spring 2022, with vol III in spring 2023
- Work to further develop interest in the locations featured in 'On the Trail of the Mortimers' was halted by the pandemic. The leaflet to publicise the locations had been printed in 2019, becoming one of the most popular leaflets in Tourist Information Centres – so much so that the first 5,000 were used by early 2020 when a decision was taken to print further copies, though the lockdown put this on hold. The work that had started to put information boards at each of the locations came to an abrupt halt, but will hopefully resume towards the end of 2021

Trustees of the Mortimer History Society, August 2021



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
Mortimer History Society

On accounts for the year
ended

31st December 2020

Charity no
(if any)

1171392

Set out on pages

1-7

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31 / 12 / 2020**

Responsibilities and
basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. *Delete [] if not applicable.*

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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

** Please delete the words in the brackets if they do not apply.*

Signed:

Date:

9 August 2021

Name:

Alan Layng

Relevant professional
qualification(s) or body

(if any):

Address:

The Reader's House
Ludlow
SY8 1AL

Section B	Disclosure
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Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

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Mortimer History Society - 1171392

Balance Sheet detailed

	As at 31/12/2020	As at 31/12/2019
Current assets		
A01: Lloyds Acct	11,745.25	15,039.87
A02: Float	83.00	53.00
A03: Paypal Acct	5,576.38	2,655.17
A04: Debtors	—	780.00
A08: Shop Stock at Sale Price	2,103.81	1,754.00
Total Current assets	19,508.44	20,282.04
Liabilities		
L03: Cheques Not Yet Cleared	—	—
Total Liabilities	—	—
Net Asset surplus (deficit)	19,508.44	20,282.04
Reserves		
Excess / (deficit) to date	(773.60)	5,004.01
Z01: Starting balances	20,282.04	15,278.03
Total Reserves	19,508.44	20,282.04

Represented by Funds		
Unrestricted	16,325.44	17,087.04
Designated	1,000.00	1,000.00
Restricted	2,183.00	2,195.00
Endowment	—	—
Total	19,508.44	20,282.04

Mortimer History Society - 1171392

Balance sheet (Separate funds)

As at: 31 December 2020

	General Fund	Designated Funds	Restricted Funds	Endowment Funds	At 31/12/2020 £	At 31/12/2019 £
Current assets						
Stocks and work in progress	2,103	—	—	—	2,103	1,754
Debtors	—	—	—	—	—	780
Cash at bank and in hand	14,221	1,000	2,183	—	17,404	17,748
Current assets	16,325	1,000	2,183	—	19,508	20,282
Net current assets less current liabilities	16,325	1,000	2,183	—	19,508	20,282
Total assets less current liabilities	16,325	1,000	2,183	—	19,508	20,282
Total net assets less liabilities	16,325	1,000	2,183	—	19,508	20,282
Represented by						
Unrestricted						
Unrestricted - General fund	16,325	—	—	—	16,325	17,087
Designated						
Designated - Events Cancellation Fund	—	1,000	—	—	1,000	1,000
Restricted						
Restricted - Ian Mortimer Fund	—	—	412	—	412	412
Restricted - Mortimer History Trail	—	—	(498)	—	(498)	(486)
Restricted - Schools and Colleges Cancellation Fund	—	—	1,430	—	1,430	1,430
Restricted - Schools and Colleges Fund	—	—	839	—	839	839
Funds of the charity	16,325	1,000	2,183	—	19,508	20,282

Mortimer History Society - 1171392
Statement of Financial Activities - summary
For the period from 01 January 2020 to 31 December 2020

	Unrestricted funds	Designated funds	Restricted funds	Endowment funds	Total funds	Prior year total funds
Total income	9,040	—	10	—	9,051	26,937
Total expenditure	9,802	—	22	—	9,825	21,933
Gains / losses on investment assets	—	—	—	—	—	—
Net income / (expenditure) resources before transfer	(761)	—	(12)	—	(773)	5,004
Gross transfers between funds - in	—	—	—	—	—	690
Gross transfers between funds - out	—	—	—	—	—	(690)
Gains on revaluation, fixed assets, charity's own use	—	—	—	—	—	—
Net movement in funds	(761)	—	(12)	—	(773)	5,004
Total funds brought forward	17,067	1,000	2,195	—	20,282	15,278
Total funds carried forward	16,325	1,000	2,183	—	19,508	20,282

Mortimer History Society - 1171392

Statement of Financial Activities

For the period from 01 January 2020 to 31 December 2020

	Unrestricted funds	Designated funds	Restricted funds	Endowment funds	Total funds	Prior year total funds
Income and endowments from:						
Donations and legacies						
Subscriptions	5,186	—	—	—	5,186	4,925
Donations	792	—	—	—	792	1,166
Legacies	—	—	—	—	—	—
Gift Aid	768	—	—	—	768	780
Income from charitable activities						
Living History Project	—	—	—	—	—	3,064
Mortimer History Trail	—	—	10	—	10	4
Research Project	—	—	—	—	—	880
Early Spring Mini-Conference	1,291	—	—	—	1,291	3,261
AGM Event	—	—	—	—	—	—
Spring Conference	50	—	—	—	50	6,263
Summer Study Visit	—	—	—	—	—	1,031
Autumn Symposium	—	—	—	—	—	1,955
Late Autumn Mini-Conference	—	—	—	—	—	—
Mortimer Journal	219	—	—	—	219	137
Other Talks and Tours	—	—	—	—	—	924
Other trading activities						
Sales of Stock	593	—	—	—	593	2,466
Investments	—	—	—	—	—	—
Other income	140	—	—	—	140	77
Total income	9,040	—	10	—	9,051	26,937
Expenditure on:						
Raising funds	108	—	—	—	108	92
Website	491	—	—	—	491	100
Purchase of Stock	202	—	—	—	202	733
Expenditure on charitable activities						
Marketing	—	—	—	—	—	1,706
Living History Project	—	—	—	—	—	2,299
Mortimer History Trail	—	—	22	—	22	490
Research Project	620	—	—	—	620	1,429
Early Spring Mini-Conference	923	—	—	—	923	3,319
Spring Conference	—	—	—	—	—	4,378
Summer Study Visit	25	—	—	—	25	1,180
Autumn Symposium	432	—	—	—	432	1,209
Late Autumn Mini-Conference	513	—	—	—	513	—
Newsletter	720	—	—	—	720	54
Mortimer Journal	4,057	—	—	—	4,057	3,651
Other Talks and Tours	500	—	—	—	500	114
Other expenditure						
Governance Costs	40	—	—	—	40	—
Trustee Expenses	365	—	—	—	365	—
Insurance	355	—	—	—	355	362
Miscellaneous	250	—	—	—	250	812
Management Software	197	—	—	—	197	—
Total expenditure	9,802	—	22	—	9,825	21,933
Gains / losses on investment assets	—	—	—	—	—	—
Net income / (expenditure) resources before transfer	(761)	—	(12)	—	(773)	5,004
Transfers						
Gross transfers between funds - in	—	—	—	—	—	690
Gross transfers between funds - out	—	—	—	—	—	(690)

	Unrestricted funds	Designated funds	Restricted funds	Endowment funds	Total funds	Prior year total funds
Other recognised gains / losses						
Gains on revaluation, fixed assets, charity's own use	—	—	—	—	—	—
Net movement in funds	(761)	—	(12)	—	(773)	5,004
Reconciliation of funds						
Total funds brought forward	17,087	1,000	2,195	—	20,282	15,278
Total funds carried forward	16,325	1,000	2,183	—	19,508	20,282