

Trustee's Report on the year 2021

Introduction

As we all know, 2021 was another year that was dominated by covid-19 and the associated restrictions on gatherings, which meant that we were able to hold only one normal event with people in attendance, the joint conference in October in Evesham. Despite this, we have continued to provide a varied and full programme of events, activities, and services, which we know have been enjoyed and appreciated by many members. Indeed, with many, if not most, people forced to live with much reduced social interaction, the regular opportunities to engage with the MHS have been greatly appreciated.

As in previous years, this annual report is structured by the objectives of the Society that are set out in the constitution in order to show how we meet our objectives; however, this year, we have made a slight change so that the objectives are expressed more clearly and tweaked to help avoid repetition in the reporting

1. Promoting the significance of the history of the medieval Mortimer family, and the Welsh Marcher lordships

In many ways, this objective is a catch-all that encompasses all the activities that we do. It is a thread, therefore, that runs through all the sections below as our programme of events, work with schools and universities, website, Mortimer Matters and all the other activities combine to promote the significance of the medieval Mortimers and the Welsh Marcher lordships.

A further contribution is, of course, the work that we do to raise the profile of the Society which is reported on in the next section.

2. Work with communities and schools to promote study of the Mortimers and the Welsh Marcher lordships and raise awareness of their significance in medieval history

Schools Medieval History Programme

For the second year running, the covid related restrictions badly affected our work with schools in south Shropshire and north Herefordshire. By 2019, the programme had built up to include 14 primary schools involving some 450 pupils, comprising a mixture of class-based activities, with some led by members of the MHS, and a popular living history day of activities at Ludlow Castle. As in 2020, the whole programme had to be abandoned in 2021, although with restrictions easing in the summer it was possible to organise a mini event at Ludlow Castle with four of the schools.

Community Information stalls

Again, opportunities in 2021 were extremely limited as most community medieval history events were not able to happen. We were able to have an MHS information stall at the Battle of Evesham Medieval Re-enactment weekend at the start of August. Over the two days, it was great to be able to meet again with very many people to chat about the

Mortimers and the Welsh Marcher lordships. Whilst we were all set to have an information stall at the Ludlow Castle Medieval Christmas Fayre at the end of November, the whole weekend was cancelled when Storm Arwen blew down the festival marquees the night before.

General Publicity

In previous years, the keyway in which we have been able to maintain the profile of the Society and our areas of interest has been through the regular publicity for our events programme. With the events programme mainly being online, we have found different ways to do this. Significantly, we have developed a contact list of all the major historical societies across Wales and the Marches, many of whom have happily circulated the information about MHS events to their members, which has resulted in both increased attendance and new members. Our MHS merchandise, which continues to be popular, also helps maintain the profile of the Society.

3. *Work with colleges and universities to encourage and support local and national scholarly research into 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 Mortimer History Society Essay Prize

The annual prize has now become a regular fixture that is greatly appreciated by scholars and academic institutions for the way in which it encourages and supports new research, particularly by younger scholars, on aspects of borderlands in the medieval period. In 2021, three essays were commended by the judges: (1) *Hexham: The Administration of a Border Liberty to c. 1400*; (2) *An Elegant Cold Collation: A Lost Letters Patent to Sudbury, 1397*; (3) *Mortimer Mawr: The Magnanimity of the Mortimers of Wigmore in the Preservation of Welsh Identity*.

Leeds International Medieval Congress, 5-9 July 2021

In 2021, the Society entered the international academic conference scene, organising a strand at the renowned International Medieval Congress (IMC), the world's premier academic conference for medieval studies, first held in 1994. Conventionally held at the University of Leeds, this year, between 5 and 9 July, over 3000 delegates from all parts of the world logged on virtually to view over 2500 individual presentations on a vast array of topics across numerous academic disciplines, under the broad conference theme of 'Climates'.

Organised by our President, Dr Paul Dryburgh, six speakers, presented short, 20-minute papers across two sessions in a strand entitled "A Different Climate?: Politics, Culture, and the Law on the Medieval Marches of Wales".

Our first session explored the effects of cultural interaction and difference in the Marches of Wales in the three centuries leading up to the Edwardian Conquest, with an emphasis on warfare, the law and legal codes and marriage and gender. Chaired by Dr Kathleen Neal of Monash University, Australia, who recently presented to the Society, the session kicked off with a fascinating paper from Dr Melissa Julian-Jones of Cardiff University which

explored inter-marcher warfare in the two centuries from 1093 to the Edwardian conquests of the late thirteenth century. It offered a fresh perspective on the nature of war in the marches and the cultural interactions between communities at war and peace. As she has done in MHS events, Dr Sara Elin Roberts delved deep into the legal system in the Marches, presenting an engaging and informative insight into the distinctive nature of law operating in the marcher lordships. Finally, Dr Emma Cavell of Swansea University discussed intermarriage among elite communities in part-occupied Wales from 1067-1282 and showed how complex networks of family and marital relationships underpinned politics, warfare, economy, and society in the medieval marches.

The second session combined the talents of two up-and-coming scholars working at the cutting edge of archival research into the late-medieval Mortimer family with an established literary expert. The session examined in more detail the national and local standing, dynastic politics, and military role of this most important of medieval English baronial/comital families. MHS communications officer Connor Williams (University of Nottingham) shared his latest research on the uses and abuses of wardship in late-medieval England by focusing on the troubling experience of minority of the Hastings and Mortimer families from 1375-94. Patrick McDonagh (Trinity College Dublin) presented his exciting research into the Mortimer affinity in Ireland at a time of crisis (two earls of March dying in Ireland in the late fourteenth century); he demonstrated the continuity of connections between marcher families and the Mortimer lords in the administration of their Irish estates, as well as the employment of men local to those estates. Lastly, Professor Kristen Over, Associate Professor of English at NEIU in Chicago, examined Arthurian history and its marcher influence by discussing the text *Fouke le Fitz Waryn and the making of homo europeus*. This brought the role of literature and literary and historic culture into the formation of identity in the Welsh Marches, and introduced delegates into the complex web of influences in elite culture throughout the Middle Ages.

Both sessions produced lively discussion and were well attended, with just under 100 delegates present. The Society hopes to repeat the sponsorship at the 2022 IMC where the overall theme is the even more suitable "Borders". Bursaries were offered to any speaker requesting support, on condition that those papers are submitted to the MHS Journal for publication. Look out for them in the 2021 edition.

A New Publication: Dynasty of Destiny: The Mortimers of Wigmore in the Middle Ages, 1066-1485 (working title)

We have commissioned 13 scholars to each write an essay on an aspect of Mortimer history to be included in an anthology, edited by Dr Paul Dryburgh and Philip Hume, that will be published and launched at our conference at the Tower of London on 1st August 2023. This has stimulated new research into many aspects of the Mortimers by scholars, many of whom are members of the MHS, who range from ones at the start of their careers to those at the top of the profession.

Indeed, two indicators of our success in working with academic institutions and supporting scholars is that, first, the society has a lively group of scholars (approximately 10% of our membership) who are actively researching and teaching aspects of medieval history and sharing their knowledge with members; secondly, scholars and publishers are beginning to ask the society to organise online book launches for them. One publisher has commented: *we actually put our launch events on hold for most of the pandemic because*

we really needed the engagement and support of history societies like yours and I wish we'd been able to find the level of expertise and interest in evidence this evening. It's a real testament to the work you and the society do. So, thank you.

4. Increase knowledge about the Mortimer family and all aspects of the Welsh Marcher lordships through lectures, conferences, study trips and publications.

The Annual Programme of Conferences, Lectures and Study Visits

Despite the circumstances we managed to run a varied and interesting programme of conferences, lectures, and events, though most had to be online. The year started with our usual half-day conference in February, this time an online conference titled "*Cherchez La Femme*": *Queenship, Law & Marriage in Medieval Wales & its March*. Some 200 people attended to listen to talks from Dr Cordelia Beattie, Dr Danna Messer, and Dr Sara Elin Roberts, who each explored aspects of women in medieval history.

In March, about 300 people attended online to view Dr Sean Cunningham, Steve David, and Anthony Rich explore the importance of the battle of Mortimer's Cross in a half-day conference titled '*Three Suns were seen in the firmament*': *the battle of Mortimer's Cross 1461*.

As restrictions were still in place in May, we had to again cancel the joint conference with the Radnorshire Society; however, we were able to replace it with a half-day online conference on '*All those things he wished to accomplish, he wisely brought to an end*': *Edward I, Wales and the Marches*. Well over 100 people viewed Dr Katherine Neal and Dr Alastair Ayton explore aspects of the life and reign of Edward I; unfortunately, the third speaker was taken ill during the morning, however, with the help from expert members of the audience we were able to facilitate an impromptu panel discussion. This event demonstrated one of the benefits of online conferences as we were able to enjoy a talk delivered from Melbourne, Australia where Dr Neale works.

Although restrictions were beginning to ease, it was still not possible to hold larger indoor gatherings in June, so the Annual Summer Lecture was again delivered online. About 100 people viewed Professor Huw Pryce's lecture on '*Perceptions of the Past in the March of Wales*'.

Finally, by late summer, we had a window during which we were finally able to organise in-person events and conferences. In August, the study trip that had been cancelled in 2020 was able to happen, and members enjoyed the opportunity to meet up again whilst visiting Hellens House, St Bartholomews, Much Marcle, and St James, Kempley.

Fortunately, the window of opportunity lasted long enough, for us to have our first conference with a live audience for 18 months. At the start of October 100 people gathered in Evesham for a joint conference with the Simon de Montfort Society and the Vale of Evesham Historical Society. During the conference, which was titled '*The Murder of Evesham, for battle it was none*': *the Second Barons' War and the battle of Evesham (1258-66)*', the audience heard five of the foremost historians of that period discuss the events of the Second Barons' War from the perspective of the key players in those crucial events – Henry III (Professor David Carpenter); Simon de Montfort (Dr Sophie Ambler); Eleanor de Montfort (Professor Louise Wilkinson); The Lord Edward (Dr Andrew Spencer);

Roger Mortimer (Dr Andy King). As we were aware that many people still had to be cautious about attending large gatherings, and also that many people who live some distance away had enjoyed being able to attend the online conferences, we trialled holding a simultaneous live online broadcast. This went very well, with over an additional 60 people attending online.

At the end of November, the society was very pleased to work with the University of Wales Press to organise a successful launch event of the new publication by Dr David Stephenson, *'Patronage and Power in the Medieval Welsh March: One Family's Story'*. The UWP was very impressed with the success of the event, the large number of organisations and people that we could send the invitation to, and the sales that were generated.

With restrictions starting to be imposed again, our half-day conference at the start of December was held online. The year ended with another successful event when nearly 100 people viewed Dr David Green, Dr Matt Raven, and Dr Laura Tompkins explore *'The House of Magnificence': aspects of the kingship of Edward III'*.

The Society has continued to have all the conferences and lectures recorded and edited as we know that the videos are enjoyed by many members whether they were unable to attend, or whether they attended but wished to view again key highlights.

Holding our events online has had the benefit of enabling us to send the event publicity much further afield than we would normally. Consequently, far more people have become aware of the Society, our work to promote interest in the Marcher Lordships and the Mortimers, have attended events and subsequently joined the Society. Online events have also enabled members who live further away to participate. As we move forward, hopefully into more normal times, whenever it is practically possible MHS events will be hybrid ones with both in-person and live online attendance.

Mortimer Matters

In 2021 we published four issues of *Mortimer Matters*, the society's newsletter, and the re-design undertaken in 2020 has become firmly established. *Mortimer Matters* is overseen by the editor and an editorial group, but now designed and set professionally by Ark Design.

The name of the game has been evolution rather than revolution. From a design point of view, we've made only minor tweaks during the year, including the introduction of a new masthead in January. From a content perspective, changes have also been gradual and have reflected the ongoing interests of the Society in the Mortimer family, the Welsh Marcher lordships, and relevant aspects of the medieval history of Wales and England. Our features have covered a wide range of issues from the legal system of the Marches, the relationship between the March and England and the powerbroking capabilities of medieval women.

We've continued to use *Mortimer Matters* as a vehicle to promote the Society's events programme. This year we've sought to add value by including interviews with or articles by some of our key speakers. For our January issue, for example, I was pleased to interview Dana Messer ahead of her presentation at our February conference, which focused on queenship, law and marriage in medieval Wales and the March. Then, in July, Andrew

Spencer gave us a deep dive into the character of Edward I ahead of his presentation to our October conference. We've also turned the spotlight on some of the accomplished academics we're lucky enough to have in membership. Each edition this year has included an article by one of them giving insights to their areas of research.

We continue to focus on books, with regular reviews and our 'bookshelf' feature, which gives a short review of new or upcoming titles, is proving popular. Not least because it often includes special discounts for Society members.

As ever, we're keen to hear what members think about *Mortimer Matters* – what you'd like to see more of or what you think you'd like to contribute. The editorial group are always on the lookout for feature ideas and suggestions that will make this newsletter ever more valuable to its readers. So please don't hesitate to get in touch at mm@mortimerhistorysociety.org.uk.

MHS WEBSITE

The Society's website has several distinct functions:

- it is a marketing tool, enabling people around the world to learn about the Society and its activities
- it is a repository of information about the Mortimers and the Marches, easily available to members and non-members alike
- it gives details and booking information about all our current activities and enables online booking
- its online shop allows members and non-members to buy a variety of publications and other items
- finally, it acts as an archive of the Society and its activities

Over the past two years the Society has produced a completely new website. It is attractively designed and very easy to navigate. Recent developments include:

- free access to all of the Society's newsletters dating back to 2009
- listing of the titles of all articles that have appeared in the MHS Journal
- links to all video recordings of the Society's lectures
- access to the *Outline Genealogy of the Mortimers* developed over many years by Dr Ian Mortimer
- new information about Mortimer heraldry
- a completely new section of the website about Mortimer castles

Future plans include:

- supplementing the information about Mortimer castles by creating new pages about castles not already described on the website
- setting up an MHS heraldry group and producing an online beginner's course on heraldry.

MHS Journal

The MHS Journal vol 4 (2020) was published during 2021, containing the usual range of essays and reviews. The essays included the winning entries from the 2019 Essay Prize – *A Task too Great for One Dynasty? The Mortimers Earls of March, the de Burgh Inheritance and the Gaelic Nobility, c. 1370 – c. 1425* (by Dr Simon Egan, which won the first prize); *Roger Mortimer, 4th earl of March – A study in minority, royal service and ‘proximity’ to the crown during the late fourteenth century* (Connor Williams); *A comparison of the development of two neighbouring townships, Wolstanmind (Welsh) and Marton (English) in the medieval Marches of Wales between 1066 and 1542* (Doreen Bowen). They were complemented by essays on *The Mortimers and Radnorshire (part 2): Marriage and Inheritance – Radnor and Elfael* (Philip Hume); *Disputed Isle: The Foundations of Mortimer power in Ireland* (Dr Colin Veach). A good range of books were reviewed in the Journal spanning the new major biography of Henry III, Medieval Welsh Genealogy, The Chronicles of Medieval Wales and the March, Edward I, Heraldry, the Economy of Medieval Wales, and St Thomas de Cantilupe.

We are extremely grateful to our President, Dr Paul Dryburgh, for all his work as editor. It is greatly pleasing to see the various articles in the MHS Journals increasingly being cited in other scholarly articles and books.

Publications

Our partnership with Logaston Press continued in 2021, with the publication in March of *The Welsh Marcher Lordships I: Central & North* (Philip Hume, Logaston Press 2021). Although we knew that there would be an interest in a book on this subject, our expectations were vastly exceeded by the speed at which it sold out, necessitating a reprint within 5 months. Just as importantly, it has received very positive reviews in various Journals and Transactions. This was the first publication in a series of 3-volumes – the second, covering the Marcher lordships in south-west Wales is due to be published in September 2022, with the third volume, the south-east, due in September 2023.

Our first publication with Logaston Press, *On the trail of the Mortimers* (Philip Hume, Logaston Press, 2016) continues to sell strongly – indeed, the third print is now nearly sold out, and thought is being given to whether to produce a revised, expanded version for the next print. The second publication with Logaston Press, *Decorated in Glory: Church Building in Herefordshire in the Fourteenth Century* (Professor Nigel Saul, Logaston Press, 2021), which developed from a talk that Professor Saul gave at one of our conferences, and which was published in November 2021, is also nearly sold out.

Dr David Stephenson's Medieval Welsh History Classes

Dr David Stephenson, who is a member of the MHS and one of the foremost historians of medieval Wales, has, for many years, run classes in medieval Welsh history in locations in mid-Wales. When the covid restrictions forced Dr Stephenson to move his weekly classes online, they became accessible to a wider audience – an opportunity that was leapt at by a number of MHS members, whose knowledge of medieval Welsh history and the Marcher lordships is now being enriched through the weekly classes and the insights from Dr Stephenson's research.

Talks to other societies

Every year we are invited to give talks to other societies about the Marcher lordships and/or the Mortimers. Despite the circumstances in 2021, we gave talks to 20 societies and organisations (including two historical themed walks); although this was restricted to online talks for the first two-thirds of the year, demand for in-person talks exploded in the final third as societies restarted their programmes. This is a great way to raise interest in the Mortimers and the Marcher lordships and attract new members.

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

Research Group

The Research Group has continued meeting every two to three weeks on average since the last report. Meetings continue to be conducted via Zoom, enabling members to study interesting documents produced by Dr Paul Dryburgh and Helen Watt. These often involve a member of the Mortimer family and usually are in Latin. Recently the group tackled a few documents in Anglo-French; a different challenge from the Latin for some members!

However, a little while ago when football was the centre of many people's attention, a document containing that subject was found and it reflected contemporaries' ideas about it. Naturally, the form of the sport being played was nothing like that played today. Paul and Helen have provided a wide range of topics for study and their helpful approach has allowed progress to be made by members in deciphering not only the handwriting but also the contractions used.

Many in the group having begun as complete novices, the progress being made by everyone – no matter what their starting level – has been immense. Even if some of the documents are representative of typical forms, none of them are straightforward and each presented its own unique problems, whether in terms of language, handwriting or difficult terminology. The group seem far more confident about recognising letter shapes and case endings in Latin and translating them with more freedom than when they started. As with anything of this nature, some people are further along their learning journey than others, but we all pull along together in solving the problems.

As Covid-19 restrictions ease, we hope that it will allow a local meeting to be arranged, since several members do not have access to Zoom.

Wigmore Castle

As many members are aware, English Heritage had to close off two or three years ago the access to the top of the mound – the shell keep – at Wigmore Castle due to accidents that had been caused by the poor condition of the access steps on the steep slope. Discussions about providing new access, either on the line of the original steps or on a less steep line, were shelved because of covid; however, discussions resumed towards the end of 2021 with site meetings arranged for 2022.

Plans for 2022–23

The highlights from our plans for this year and next are:

The Annual Programme of Conferences, Lectures and Study Visits

At the time of writing, it is looking very hopeful that we will be able to resume a full programme of events and activities during 2022. The first event has, of course, already happened. When the programme was being planned it seemed sensible to plan the February event as online only, and the wisdom of this was borne out by the circumstances in February, when c.100 people enjoyed three talks on *Passion and Power in the Marches*

At the start of March, we were pleased to organise with the University of Hertfordshire Press an online launch of a new book by Dr Craig Owen Jones: *Princely Ambition: Ideology, Castle Building, and landscape in Gwynedd 1194–1283*

Today, our AGM is being followed by a talk and tour on the Medieval History of Weobley.

The rest of the year starts with our joint conference with the Radnorshire Society – first scheduled for May 2020, and twice cancelled, it looks as though it will finally happen. The conference has a great line up of speakers who will explore the tempestuous relationships between the Mortimers and princes of Wales

Saturday 14th May: **Full-day Conference** in Knighton: *'Murder, Mayhem and Marriage': The Mortimers and the Welsh Princes*

In June, we are honoured that one of the most respected medieval historians, Professor Daniel Power will give our Summer Lecture, which has now been retitled the John Grove Memorial Lecture:

Wednesday 22nd June 7.00pm: **John Grove Memorial Lecture:** *'The rupture of the Anglo-Norman aristocracy after the fall of ducal Normandy (1204)'*. Prof. Daniel Power

Many members will know that John Grove, who died in December, was not only the founder of the MHS, but had earlier founded the Friends of Usk Castle Society. In memory of John, we have organised with the Friends an additional free half-day joint conference:

Saturday 9th July (morning): **Usk Castle and the Mortimers:** A conference in memory of John Grove

One consequence of the disruptions to the programme over the last two years is that we have two events this year that are focussed on castles – a topic of fascination to many people interested in medieval history. At the end of July, we have an intriguing day planned to look at how castles were built and developed, using Ludlow Castle as a case study with its extensive ruins that demonstrate castle building across 6 centuries. Then our symposium in October will have an eclectic range of talks on castles in Wales and the Marches.

Saturday 30th July: **How to Build a Castle:** A special one-day conference exploring the construction and development of Ludlow castle

Saturday 8th October: **Full-day Castle Symposium:** *Castles of Wales and the Marches*

The final event will be:

Saturday 3rd December: **Half-day Conference:** Medieval Christmas

Looking forward to 2023, plans are progressing for our exciting conference to be held at the **Tower of London on 1st August** – the 700th anniversary of Roger Mortimer's escape from the Tower. This event will also be the launch of our new book mentioned earlier.

Leeds International Medieval Congress, 4-8 July 2022

Following our successful venture in 2021, we have organised another strand of two sessions on 5th July 2022. Each session will explore aspects of the March of Wales, the network of fifty or so more or less independent lordships on the western border of England, which served many purposes. Primarily the lordships formed a border zone between the English and the Welsh. They also served as power bases and sources of income for their lords, which included some of the most powerful magnates in the English realm. The March was a place of contrasts and complexities, reflecting the ambiguities of its cultural, social, and legal status. The first session of four talks explores aspects of the Marcher lordships on the English side of the border; whilst the second series of talks explores aspects of the Marcher lordships on the Welsh side of the border.

MHS Essay Prize, Journal, and Publications

The essays for the 2021 Prize will be judged during March, following which the 2022 Prize will be launched; and the Journal Vol 5 (2021) will be published. Vol 2 in our series on the Welsh Marcher Lordships, which will cover the south-west, will be published in late September.

Schools Programme

The programme with primary schools in south Shropshire and north Herefordshire is set to resume with eleven schools and nearly 400 children participating.

Photography Competition and 2024 Calendar

The Society has recently launched a photography competition, with entries invited on the theme: *The Medieval History of the Welsh Marcher Lordships*. The winning entry will receive a prize of £100, with the twelve best photos appearing in the Mortimer History Society Calendar 2024, proceeds from which will support the educational work of the society. The closing date is 28th October, and the calendar will be on sale from spring 2023. In addition to supporting our educational work, the competition and calendar will be a great way to raise the profile of both the Society and the Marcher lordships.

Trustees of the Mortimer History Society, March 2022



CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name

MORTIMER HISTORY SOCIETY

On accounts for the year
ended

31/12/2021

Charity no
(if any)

1171392

Set out on pages

(remember to include the page numbers of additional sheets)

Respective
responsibilities of
trustees and examiner

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

The charity's trustees consider that an audit is not required for this year under section 144 of the Act and that an independent examination is needed.

It is my responsibility to:

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

Basis of independent
examiner's statement

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

Independent
examiner's statement

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

- accounting records were not kept in accordance with section 130 of the Charities Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn 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:

N. J. Lawrence

Date:

24/02/22

Name:

NATASHA JAYNE LAWRENCE

Relevant professional
qualification(s) or body
(if any):

Address:

41 WESTCROFT

LEOMINSTER

HEREFORDSHIRE, HR6 8HF

Section B

Disclosure

Only complete if the examiner needs to highlight 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.

Mortimer History Society - 1171392
Statement of Financial Activities - summary
For the period from 01 January 2021 to 31 December 2021

	Unrestricted funds	Designated funds	Restricted funds	Endowment funds	Total funds	Prior year total funds
Total income	12,353	—	90	—	12,443	9,051
Total expenditure	13,335	—	148	—	13,483	9,825
Net income / (expenditure) resources before transfer	(981)	—	(58)	—	(1,039)	(773)
Net movement in funds	(981)	—	(58)	—	(1,039)	(773)
Total funds brought forward	16,325	1,000	2,183	—	19,508	20,282
Total funds carried forward	15,343	1,000	2,125	—	18,468	19,508
Unrestricted						
General fund	15,343	—	—	—	15,343	16,325
Designated						
Events Cancellation Fund	—	1,000	—	—	1,000	1,000
Restricted						
Ian Mortimer Fund	—	—	412	—	412	412
Mortimer History Trail	—	—	(498)	—	(498)	(498)
Schools and Colleges Cancellation Fund	—	—	1,430	—	1,430	1,430
Schools and Colleges Fund	—	—	781	—	781	839

There may be minor discrepancies in the totals if the pence are not being shown

Mortimer History Society - 1171392

Balance Sheet detailed

		As at 31/12/2021	As at 31/12/2020
Current assets			
	A01: Lloyds Acct	15,846.75	11,745.25
	A02: Float	83.00	83.00
	A03: Paypal Acct	237.80	5,576.38
	A04: Debtors	—	—
	A08: Shop Stock at Sale Price	2,300.99	2,103.81
	Total Current assets	18,468.54	19,508.44
Liabilities			
	L03: Cheques Not Yet Cleared	—	—
	Total Liabilities	—	—
	Net Asset surplus (deficit)	18,468.54	19,508.44
Reserves			
	Excess / (deficit) to date	(1,039.90)	4,230.41
	Z01: Starting balances	19,508.44	15,278.03
	Total Reserves	18,468.54	19,508.44

Represented by Funds		
Unrestricted	15,343.54	16,325.44
Designated	1,000.00	1,000.00
Restricted	2,125.00	2,183.00
Endowment	—	—
Total	18,468.54	19,508.44

Signed: N. J. Lawrence
Date: 24/02/22

Mortimer History Society - 1171392

Balance Sheet detailed

	As at 31/12/2021	As at 31/12/2020
Current assets		
A01: Lloyds Acct	15,846	11,745
A02: Float	83	83
A03: Paypal Acct	237	5,576
A04: Debtors	—	—
A08: Shop Stock at Sale Price	2,300	2,103
Total Current assets	18,468	19,508
Liabilities		
L03: Cheques Not Yet Cleared	—	—
Total Liabilities	—	—
Net Asset surplus (deficit)	18,468	19,508
Reserves		
Excess / (deficit) to date	(1,039)	4,230
Z01: Starting balances	19,508	15,278
Total Reserves	18,468	19,508

Represented by Funds		
Unrestricted	15,343	16,325
Designated	1,000	1,000
Restricted	2,125	2,183
Endowment	—	—
Total	18,468	19,508

Mike Beazley

Mike Beazley, Hon Treasurer, 24 February 2022

There may be minor discrepancies in the totals if the pence are not being shown

Mortimer History Society - 1171392

Balance sheet (Separate funds)

As at: 31 December 2021

	General Fund	Designated Funds	Restricted Funds	Endowment Funds	At 31/12/2021 £	At 31/12/2020 £
<i>Current assets</i>						
Stocks and work in progress	2,300	—	—	—	2,300	2,103
Cash at bank and in hand	13,042	1,000	2,125	—	16,167	17,404
Current assets	15,343	1,000	2,125	—	18,468	19,508
Net current assets less current liabilities	15,343	1,000	2,125	—	18,468	19,508
Total assets less current liabilities	15,343	1,000	2,125	—	18,468	19,508
Total net assets less liabilities	15,343	1,000	2,125	—	18,468	19,508
<i>Represented by</i>						
<i>Unrestricted</i>						
Unrestricted - General fund	15,343	—	—	—	15,343	16,325
<i>Designated</i>						
Designated - Events Cancellation Fund	—	1,000	—	—	1,000	1,000
<i>Restricted</i>						
Restricted - Ian Mortimer Fund	—	—	412	—	412	412
Restricted - Mortimer History Trail	—	—	(498)	—	(498)	(498)
Restricted - Schools and Colleges Cancellation Fund	—	—	1,430	—	1,430	1,430
Restricted - Schools and Colleges Fund	—	—	781	—	781	839
Funds of the charity	15,343	1,000	2,125	—	18,468	19,508

There may be minor discrepancies in the totals if the pence are not being shown

Mortimer History Society - 1171392

Statement of Financial Activities - summary

For the period from 01 January 2021 to 31 December 2021

	Unrestricted funds	Designated funds	Restricted funds	Endowment funds	Total funds	Prior year total funds
Total income	12,353	—	90	—	12,443	9,051
Total expenditure	13,335	—	148	—	13,483	9,825
Net income / (expenditure) resources before transfer	(981)	—	(58)	—	(1,039)	(773)
Net movement in funds	(981)	—	(58)	—	(1,039)	(773)
Total funds brought forward	16,325	1,000	2,183	—	19,508	20,282
Total funds carried forward	15,343	1,000	2,125	—	18,468	19,508
Unrestricted						
General fund	15,343	—	—	—	15,343	16,325
Designated						
Events Cancellation Fund	—	1,000	—	—	1,000	1,000
Restricted						
Ian Mortimer Fund	—	—	412	—	412	412
Mortimer History Trail	—	—	(498)	—	(498)	(498)
Schools and Colleges Cancellation Fund	—	—	1,430	—	1,430	1,430
Schools and Colleges Fund	—	—	781	—	781	839

There may be minor discrepancies in the totals if the pence are not being shown

Analysis of income and expenditure
Selected period: 01 January 2021 to 31 December 2021

	Unrestricted	Designated	Restricted	Endowment	This year	Total Last year
Income and endowments						
<i>Donations and legacies</i>						
101 - Subscriptions	5,900	—	—	—	5,900	5,186
102 - Donations	601	—	—	—	601	792
104 - Gift Aid	796	—	—	—	796	768
<i>Donations and legacies Totals</i>	7,298	—	—	—	7,298	6,746
<i>Income from charitable activities</i>						
201 - Living History Income	58	—	90	—	148	—
202 - Mortimer History Trail Income	—	—	—	—	—	10
204 - Early Spring Conf Income	—	—	—	—	—	1,291
205 - AGM Income	40	—	—	—	40	—
206 - Spring Conf Income	—	—	—	—	—	50
207 - Summer Visit Income	364	—	—	—	364	—
208 - Autumn Symp Income	3,470	—	—	—	3,470	—
209 - Late Autumn Conf Income	299	—	—	—	299	—
210 - Mortimer Journal Income	135	—	—	—	135	219
211 - Other Talks and Tours Income	69	—	—	—	69	—
<i>Income from charitable activities Totals</i>	4,437	—	90	—	4,527	1,570
<i>Other trading activities</i>						
301 - Sale of Stock	616	—	—	—	616	593
<i>Other trading activities Totals</i>	616	—	—	—	616	593
<i>Other income</i>						
501 - Other Income	1	—	—	—	1	140
<i>Other income Totals</i>	1	—	—	—	1	140
Income and endowments Grand totals	12,353	—	90	—	12,443	9,051

Expenditure*Raising funds*

E306 - Paypal Charges	98	—	—	—	98	90
E307 - Subs Refunds	50	—	—	—	50	18
E101 - Website Costs	373	—	—	—	373	491
E102 - Purchase of Stock	872	—	—	—	872	202
<i>Raising funds Totals</i>	1,394	—	—	—	1,394	802

Expenditure on charitable activities

E201 - Marketing	103	—	—	—	103	—
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There may be minor discrepancies in the totals if the pence are not being shown

	Unrestricted	Designated	Restricted	Endowment	This year	Total Last year
E202 - Living History Project Costs	—	—	148	—	148	—
E203 - Mort Hist Trail Costs	—	—	—	—	—	22
E204 - Research Project Costs	—	—	—	—	—	620
E205 - Early Spring Conf Costs	369	—	—	—	369	923
E207 - Spring Conf Costs	641	—	—	—	641	—
E208 - Summer Study Visit Costs	627	—	—	—	627	25
E209 - Autumn Symp Costs	3,127	—	—	—	3,127	432
E210 - Late Autumn Mini-Conf Costs	222	—	—	—	222	513
E211 - Newsletter Costs	960	—	—	—	960	720
E212 - Mortimer Journal Costs	2,829	—	—	—	2,829	4,057
E213 - Other Talks and Tours	1,908	—	—	—	1,908	500
<i>Expenditure on charitable activities Totals</i>	10,788	—	148	—	10,936	7,814
<i>Other expenditure</i>						
E206 - AGM Costs	58	—	—	—	58	40
E301 - Governance Costs	80	—	—	—	80	—
E302 - Trustee Expenses	345	—	—	—	345	365
E303 - Insurance Costs	150	—	—	—	150	355
E304 - Miscellaneous Costs	517	—	—	—	517	250
E305 - Software Costs	—	—	—	—	—	197
<i>Other expenditure Totals</i>	1,151	—	—	—	1,151	1,207
Expenditure Grand totals	13,335	—	148	—	13,483	9,825

There may be minor discrepancies in the totals if the pence are not being shown