

### Trustee's Report on the year 2023

#### Highlights of 2023

- The stand-out highlight of the year has to be when over 160 people enjoyed our most ambitious conference yet in the magnificent setting of the Tower of London on 1<sup>st</sup> August to mark the 700<sup>th</sup> anniversary of the escape from the Tower by Roger Mortimer (d.1330) and to celebrate the publication of our new anthology of essays.
- Not far behind was the John Grove Memorial lecture in June which was delivered by Dr David Stephenson in the splendid rooms of Powis Castle.
- With Logaston Press, we published two new books (*The Welsh Marcher Lordships II: South West*, by John Fleming; and *The Mortimers of Wigmore 1086–1486: Dynasty of Destiny*, eds. Paul Dryburgh and Philip Hume), and also, having sold out twice, *The Welsh Marcher Lordships I: Central & North* by Philip Hume was reprinted with an extended bibliography.
- The Society launched and awarded its new Research Bursary. Funded by the generous donations of members, we were able to invite applications from postgraduate researchers for the £1,000 Bursary to help meet the costs of their research. A number of excellent applications were received.
- In addition to sponsoring two sessions at the *Leeds International Medieval Congress* in 2023, the MHS hosted a reception to launch the publication of the '*Mortimers of Wigmore*'. With over 80 academics and scholars attending the reception we were overwhelmed by the expressions of appreciation for the work the Society does to encourage and support research into the March of Wales and the Mortimers through the Essay Prize, the Journal, sponsorship of the IMC sessions, the Online Seminar group, and the new Research Bursary.
- The new online seminar group on *Medieval Wales and the Marches* was launched at the start of 2023. Over the course of the three terms during the year, thirteen seminars were delivered enabling scholars to network and share their research. Recordings of all the seminars are available on the MHS website. Membership has grown to over 200.
- New schools joined our annual programme of work with local schools.
- The Society commissioned Chris Jones-Jenkins, the talented and experienced architectural artist, to produce a new reconstruction drawing of Wigmore castle. The Castles Studies Trust agreed to provide match funding for this project.
- The Mortimer History Society Journal vol 5 was published towards the end of the year.

As in previous years, the rest of this annual report is structured in line with the objects of the Society as set out in our constitution, in order to show how we meet our objectives.

## ***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, publications and all the other activities combine to promote the significance of the medieval Mortimers and the Welsh Marcher lordships.

## ***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*

Preparations for the 2023 programme began in November 2022 with a meeting called for all schools interested in taking part to begin planning for the following year. Unfortunately, two schools dropped out of the programme at this point and another school decided only to send one year group instead of two, but we were lucky to find two additional new schools that wanted to take part in the activities so the projected number of children taking part was not severely affected. However, we felt that it was necessary to raise the charge per pupil from £8.50 to £10 in order to be certain of being able to cover our costs. This was discussed in the planning meetings and the organising Trustee, Kathy Cowell, was pleased to hear from the schools that they thought the service that we provided was well worth the increased charge.

Seven schools took part in the programme and brought a total of 286 children (with two extra children arriving on the day) to Ludlow Castle on 29<sup>th</sup> June. However very few schools booked in-school sessions with members of the society. It seemed that there was more time needed for SATs testing this year which resulted in the Living History Day in the Castle taking place at the end of June, so perhaps this left less time for any further activities to be booked. The in-school sessions were: one in which children were able to have a more detailed look at the weaponry used by a man-at-arms, one involving castle building with year 1 children and another in which children could investigate the history of maps and study maps of the area around their school to learn more about its history.

The day in the castle in June was most successful and everyone who took part made very favourable comments and we all are looking forward to the same event taking place again this year. A date has been booked for the end of June 2024 and initial meetings have taken place with schools to plan for this year's programme. A total of eleven schools have expressed interest in taking part although final numbers have yet to be confirmed.

### *Talks to other societies*

Every year we are invited to give talks to other societies about the Marcher lordships and/or the Mortimers, with talks given to about 15 societies in 2023, generating new interest in the Mortimers and the Marcher lordships and attracting new members.

### Community Information stalls

The Society had its regular information stall at the Battle of Evesham Medieval Re-enactment weekend at the start of August. This is now the second largest medieval festival in the country, and, over the two days, there was a constant flow of people wanting to talk about the Mortimers and the Welsh Marcher lordships.

### General Publicity

The regular publicity for events maintains the profile of the Society, along with the leaflet in many public places. We remain in regular contact with all the major historical societies across Wales and the Marches, many of whom happily circulate the information about MHS events to their members, which has resulted in both increased attendance and new members.

### ***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***

#### MHS Research Bursary

As looked forward to in the Trustees' Report last year, the new research bursary was launched in 2023. This first year was a great success due to the generosity of the donations by members.

Four students applied for the bursary of £1,000, outlining the research they intended to carry out and how any money from the bursary would be spent. The areas of study described by the applicants were varied and interesting, needing careful consideration by the judges to arrive at the winner – Gabriella Williams. She started her PhD study in the autumn, studying medieval misinformation, the spread and impact of political rumour in the 15<sup>th</sup> century. She personally attended the conference in Leominster in November when members were pleased to meet her. She has given a short report on how the money has helped her so far and it was heart-warming to read her account.

In January 2024, a request for members once again to consider contributing to this year's bursary was launched. This is a very worthwhile project, allowing young people to benefit from the extra help the £1,000 prize provides. The professional judges for this year will continue to be Profs Janet Burton and Helen Fulton, with the Society's trustees, Yve James and Annie Garthwaite.

#### The Mortimer History Society Essay Prize

The annual prize continues to be greatly appreciated by scholars and academic institutions for the way in which it encourages and supports new research on aspects of borderlands in the medieval period, particularly by younger scholars.

For the 2022-23 Essay Prize that was awarded in April 2023, a total of two prizes and a commendation were awarded. The authors and titles of these essays, alongside the prizes awarded, are: (1) Dr Harry Lewis (UK Foreign, Commonwealth & Development Office), a recent graduate of the University of Edinburgh, has been awarded first prize for an essay entitled 'The Cistercian Order, Mountain Lords and Heresy in the Languedoc Borderlands,

1209-1244'; (2) Dr Andy King, an expert in Anglo-Scottish relations in the late Middle Ages, has been awarded second prize for an essay entitled 'Lordship in the Plantagenet Empire: The Mortimers and Ireland in the Late-Fourteenth Century'; (3) Amy Reynolds (Denbighshire Heritage Services), a recent graduate of the University of Bangor, has been commended for an essay entitled: 'An Age of Decline? Border Abbeys and Welsh culture in late medieval Wales'. First, in his essay Dr Lewis examines the nature and existence of the 'Cathars', including their depiction as heretics and the characteristic of the 'Cathar Church', while exploring the minor lords who defended them. He explores his subject through local and crusader perspectives, providing a series of case studies focused on the borderland lordships of Niort, Montréal and Cabaret, which highlight the significance of their respective connections both to the Cistercian Order and to the Cathars. Second, in his essay Dr King focuses on the Mortimers' fourteenth-century campaigns to Ireland, which he argues provide an illuminating glimpse into the problems, constraints and, indeed, opportunities, for English 'transnational' landholders in Ireland. He skilfully unpicks the complex interaction of landholding, royal government and the conduct of warfare, in the wider – and often turbulent – context of domestic English politics. Third, in her essay Amy Reynolds challenges the misconception that the Cistercian Order was in decline in Wales during the late Middle Ages by analysing their cultural output at Valle Crucis Abbey and by demonstrating how, through their involvement in Welsh manuscript production and as patrons of Welsh poetry and medieval architectural development, the Cistercians were flourishing culturally. These essays will be published in the seventh volume of the Journal of the Mortimer History Society (2023). The chair of the judging panel for the Essay Prize has been Professor Chris Given-Wilson since its inception in 2016. Whilst remaining a judge, Chris has stood down from the role of Chair, with one of the other judges, Professor Louise Wilkinson becoming the new Chair. We are extremely grateful for the wisdom, perception, and commitment that Chris brought to the role, and to Louise for stepping up. The closing date for the current Essay Prize Competition (2023-2024) is 1<sup>st</sup> March 2024. after which the Essay Prize Competition for 2024-25 will be launched.

#### Leeds International Medieval Congress, 3<sup>rd</sup>–6<sup>th</sup> July 2023

Following our success in 2021 and 2022, the Society again sponsored sessions at the 2023 Leeds International Medieval Congress (IMC), the world's premier academic conference for medieval studies, held annually at the University of Leeds. This year the strand had been organised by Amy Reynolds of Bangor University. Again, we awarded bursaries to scholars who were giving papers in our sponsored sessions and did not have access to institutional funding. As in 2022, the IMC was a hybrid event enabling over 3000 speakers and delegates from around the world to come together. Under the IMC 2023 umbrella theme of *Networks & Entanglements*, eight speakers contributed diverse but complimentary papers to a packed seminar room during two fascinating sessions sponsored by the MHS on Tuesday 4<sup>th</sup> July.

The first session, titled *Networks and Entanglements in Medieval Wales 1: Networks in Politics and Economics*, explored networks in Welsh politics and economics. Papers one and two (Rebecca Thomas – 'Hostages in Medieval Wales'; and Adam Chapman – 'Supplying both sides: what did the Glyndwr rebellion take from England'?) were concerned with networks generated as part of conflict within Wales and with England and demonstrated how political and economic networks were utilised during times of conflict.

The third paper (Caroline Bourne – ‘A Network of Cattle Ranches: The Vaccary Enclosure System in Early Medieval Wales’) had a more economic theme and explored the role of pastoral farming networks and their impact on the vaccary enclosure system of early medieval Wales, focusing on the Gower region of south-west Wales.

The second session, titled *Networks and Entanglements in Medieval Wales 2: Religious Networks*, discussed the religious networks of medieval Wales, through the various networks of priests, monks and bishops. Paper one (Amy Reynolds – ‘A network of Abbeys: the spread of the Cistercian order in Wales’) explored the spread of the Cistercians in Wales and the role of the Cistercian network in founding new monasteries. Paper two (Rhun Emlyn – Networks of University-trained clergy in 12<sup>th</sup>/13<sup>th</sup>-century Wales (title tbc) explored University-trained Welsh clergy and how the University network impacted clergy in twelfth and thirteenth-century Wales. Paper three (Shaun McGuinness – ‘Medieval Welsh Bishops and their political networks’) discussed medieval Welsh bishops and how they developed and utilised political networks.

In the evening the Mortimer History Society hosted a successful reception for the first launch of ‘*The Mortimers of Wigmore 1066–1485: Dynasty of Destiny*’. In the course of a little over an hour, over 80 people attended the reception with many copies of the anthology being sold, along with copies of the Society’s other publications. The most rewarding aspect of the reception was that so many of the academics and scholars expressed their appreciation for what the Society does to encourage and support research, particularly by young scholars, through the Essay Prize, Journal, IMC sponsorship, Online Seminar Group, and now the Research Bursary. Paul Dryburgh and Philip Hume were asked to pass on their thanks to all MHS members for their commitment, support, and generosity.

#### *Online Seminar Group: Medieval Wales and the Marches*

Last year, we reported that during the second half of 2022 we had worked with colleagues from Bristol, Swansea, and Chester universities to create a new ‘*Online Seminar Group: Medieval Wales and the Marches*’ to provide a forum for academics and scholars to share new research papers, stimulate discussion, and obtain feedback. The initiative had received an amazing response with over 180 academics, independent scholars and interested members of the MHS joining the group. With the groundwork achieved, 2023 saw the successful completion of three programmes of seminars with 13 papers delivered over the three terms, and with membership growing to over 200. Papers were given on a range of subjects as diverse as monasticism, literature, poetry, and politics. The 2024 programme is well underway, and if you would like to be added to the mailing list, please contact Philip Hume

#### ***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*

In 2023 we were able to enjoy the most ambitious programme yet planned by the Society. The highlight of the year was the conference at the Tower of London on 1<sup>st</sup> August, organised to mark the 700<sup>th</sup> anniversary of the escape of Roger Mortimer (d.1330) from the Tower, and to celebrate the publication of our new anthology of essays (see below).

Seated in the Banqueting Suite in the Royal Armouries inside the Tower, over 160 people enjoyed a series of talks about Roger Mortimer and his imprisonment in and escape from the Tower, the Mortimer family in the late 14<sup>th</sup> century, and an exploration of what we know about the mysterious Sir John Mortimer who was 'judiciously murdered' when executed in the Tower by the government of the child king Henry VI in 1424. Even the weather co-operated as attendees were able to explore the Tower on a sunny afternoon.

Not content with a conference at the Tower of London, we had also arranged for the John Grove Memorial Lecture to be delivered by Dr David Stephenson in the magnificent setting of Powis Castle. Not surprisingly, the evening was sold out. We started with an introduction to the castle by Dr Stephenson, followed by time to explore the rooms at our leisure. Following refreshments, attendees gathered in the splendid ballroom to listen to the lecture.

Also for the first time, the online half-day conference at the end of January was followed by a series of four evening talks over the following four weeks. The half-day event had explored '*Education and Learning in Medieval Wales and the Marches*', with the subsequent evening talks focussed on a particular medieval scholar.

The AGM in March, which was held in St George's, Orleton, included two talks, the first on the medieval oak chests in St George's and the second on the Mortimers and Orleton. The Spring Conference in May explored the topic of '*Marriage, Sex, and Dynasty Building in the Medieval period*', whilst the Autumn Symposium had its usual eclectic mix of talks. The year ended with a half-day conference in November on '*Writing the past: Great historical fiction and the medieval history that inspires it*'.

### Publications

Two books were published in 2023 and one reprinted with an extended bibliography, continuing our partnership with Logaston Press. March saw the publication of the eagerly anticipated second volume in our 3-volume series on the Marcher Lordship – *The Welsh Marcher Lordships II: South-West* by MHS Trustee, John Fleming. Covering the lordships of the counties of Carmarthenshire and Pembrokeshire, it quickly 'flew off the bookshelves' with nearly 1,000 copies sold in the remaining 9 months of 2023, with positive reviews starting to appear in the press. The same day in March saw the publication of a new edition of *The Welsh Marcher Lordships I: Central & North*. First published in 2021, when the second print was close to being sold out towards the end of 2022, a decision had been taken to publish a new edition in 2023 with an extended bibliography.

Finally, the summer saw the publication by Logaston Press of a major new anthology of essays: *The Mortimers of Wigmore 1066–1485: Dynasty of Destiny*, edited by Paul Dryburgh and Philip Hume. The idea of a new publication had first been conceived in 2020 as one way to mark the 700<sup>th</sup> anniversary of the escape of Roger Mortimer from the Tower of London on 1<sup>st</sup> August 1323. A number of academics and scholars were commissioned to write the essays, and it is an amazing achievement by everyone that the anthology was published as planned in July 2023 in time for the launches at Leeds IMC and the Tower of London as reported above. Given the nature of multi-authored books, many anthologies are published a long time after first planned with some never seeing the light of day. We are extremely grateful to all the authors, the editors, and to Logaston Press that not only

was 'our' anthology published when planned in time for the major events, but has such high quality in both content and production.

### *Mortimer History Society Journal*

In 2023, Alastair Ayton was appointed assistant editor to work with Paul Dryburgh, and after a delay caused largely by the Covid-19 pandemic, the fifth volume of the Journal of the Mortimer History Society was published at the end of 2023. This volume contains three peer-reviewed essays and no fewer than eight reviews. Two of the essays were submitted across two of the Mortimer History Society's Essay Prize competitions (2020/2021), while the third essay was contributed by one of the foremost historians working in Wales today. All three essays reflect the vibrancy of research currently being conducted on the history of the Mortimers and the medieval Marches of Wales more generally. The reviews included in the latest volume similarly highlight the rich diversity of work being produced on the Mortimer family and their region. From castle-building to Welsh law texts and the place of women in the March, from tracing a single family's fortunes in the March across many generations to explaining why the Middle Ages matter, the fifth volume of the Journal demonstrates the wide appeal of the Mortimers and the Marches of Wales as subjects worthy of attention and of further research.

It is the intention of the Mortimer History Society to publish the sixth volume of the Journal by the summer of 2024, with the seventh volume being published shortly thereafter in early 2025. The aim of this timeline is to ensure the publication of all subsequent volumes falls within the same year of their production.

### *Mortimer Matters*

In 2023 we published four issues of *Mortimer Matters*, the society's newsletter, with issues in January, April, July and October – each one coming out at the end of the respective month. *Mortimer Matters* is edited by Annie Garth Waite, supported by Elizabeth Holley as proof reader and by Ark Design, a professional design company.

Content continues to reflect 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 career of Elizabeth de Burgh, the culture of the medieval March and the legacy of Anne Mortimer in the Yorkist claim to the throne.

We've continued to use *Mortimer Matters* as a vehicle to promote the Society's events programme. In particular, *Mortimer Matters* became a primary vehicle in the communications for the 700<sup>th</sup> Anniversary event at the Tower of London – the Society's most ambitious event yet. We continue to add value by including interviews with or articles by some of our key speakers. In our April issue, for example, Nicholas Orme provided a feature on medieval childhood ahead of his presentation at the Spring Conference. Then, in July, Dr Emma Cavell looked in depth at the marriage of Roger and Maud Mortimer, after delivering an excellent presentation on the characteristics of medieval marriage at the same conference. We've also turned the spotlight on some of the accomplished academics we're lucky enough to have in membership, with article giving insights to their areas of research.

We continue to focus on books, not least the Society publishes itself, with regular reviews. 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 editor is always on the lookout for feature ideas and suggestions that will make this newsletter even more valuable to its readers. So please don't hesitate to get in touch at [mm@mortimerhistorysociety.org.uk](mailto:mm@mortimerhistorysociety.org.uk).

### MHS Website

Many people first come across the Society through our website when they are researching the March of Wales and the Mortimers. All the main articles from the MHS Journal and from *Mortimer Matters* are indexed on the website, as are links to all our recorded talks, thus providing an easily-accessible and ever-increasing archive for the Society. Work is being done to create an effective archive.

Over the past two years responsibility for the website has transferred, gradually, from Hugh Wood to Clive Jupp. Hugh did tremendous work modernising the site and developing the content. The result is a good looking and well organised website that is a repository for a large set of information related to the Mortimers and the March of Wales. Hugh in his "retirement" continues to work on his specialism of Heraldry and is developing a course on this subject that will be delivered through the website.

Clive maintains the website applying updates for events with links to talks and other materials. Over the coming year we will be reviewing the future needs of the website. This will not be a rush to alter pages for the sake of change; rather a consideration of what features will be needed or could enhance the ability to access the information we already hold and will add in the future. Thoughts from any member on changes we might make or features we could add, that would forward this aim will be very welcome.

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

#### Medieval Documents Research Group

The group welcomed some new members during the year and continues to meet regularly by Zoom. Most of the documents are beautifully written in Latin. More Norman-French ones have been studied, helping people to gain greater proficiency.

Another weekend course was arranged for September 23-24 when members were able to visit Hereford Cathedral on the Saturday morning. People were divided into two groups to enable everyone to see clearly. The venues for visiting were the exhibition, including Mappa Mundi and the Cathedral Archives. Afterwards, the groups changed places to allow everyone to experience both sites. Elizabeth Semper O'Keefe, the Archivist, had arranged an excellent display showing the range of documents held there. On view were several documents relating to Roger Mortimer who died 1330. Digital copies were purchased enabling members to study them during the rest of the weekend.

Everyone enjoyed the weekend very much, therefore another one is being planned for March 2024.



If you have an interest in what we do and would like to join our friendly group, we would be pleased to welcome you. There is no pressure on anyone during the meetings, allowing people to learn at their own pace. If you would like more information, or to join, please contact me, Yve James at: [mortimerhistorysociety.org.uk](http://mortimerhistorysociety.org.uk). Click on contact us and then medieval document group. You will find a page to complete your details etc and the email will be sent to me.

### Wigmore Castle

Towards the end of 2022, we made an application to the Castle Studies Trust for matched funding to commission a new reconstruction drawing of Wigmore Castle. Early in 2023, we received the great news that the application had been approved, enabling us to commission MHS member Chris Jones-Jenkins, who is one of the foremost castle reconstruction artists in Wales and England, to start work on the project. As well as developing understanding of what Wigmore might have looked like as a magnificent castle in the early 14<sup>th</sup> century, the reconstruction drawing will help to raise awareness of the castle and the Mortimers.

We have continued to liaise with English Heritage on their plans to create a new access to the top of the keep mound which has now been closed for a number of years. The finances for the project are in English Heritage's budget, though there is now a delay before the scheme can be implemented as Heritage England has required that some archaeological work is carried out first. Communication with English Heritage has improved as one of our committee members became a volunteer guide and site monitor for English Heritage.

## **6. Changes in Personnel**

After serving as a Trustee for all fourteen years of the Society's existence, Hugh Wood stood down in 2023 as a Trustee and Chair of the Society. A founding member, Hugh had served in numerous capacities – membership secretary, treasurer, website manager, event organiser, editor of *Mortimer Matters*, heraldry expert, and, latterly, Chair. In all these roles, Hugh has made an enormous contribution to the Society, which has been appreciated by everyone. As noted below, Hugh is not disappearing completely, though! Kirsten Lawton-Smith, who has been an assistant editor of *Mortimer Matters* and a member of the Programme Committee also retired during the year. One reason for Kirsten taking a break is that she has a book to finish – the 3<sup>rd</sup> volume of our series on the Marcher Lordships. Our thanks to Kirsten and Hugh for all that you have done and will continue to do for the Society.

## **Plans to look forward to in 2024**

Our plans for this year include two highlights:

The launch in the next few months of a new MHS **Heraldry Group**. Since he stood down as Chair last summer, Hugh Wood has been focused on bringing his ideas to fruition. Catering for experts and beginners alike, and ensuring that members around the world can join in, we're focusing the group around a new heraldry blog, with regular short articles of general heraldic interest. We'll be covering all aspects and periods of the subject, though *Mortimer heraldry* will obviously be a feature. Aware that many members are interested in principle, but know little, we've written an online "Teach Yourself Heraldry"

course which will also be available on our website. Members who live in the Marches will also have the opportunity to enjoy days out, visiting places of special interest, and maybe the occasional lecture.

The summer will also see the unveiling of the new **reconstruction drawing of Wigmore Castle** by Chris Jones-Jenkins.

### *The Annual Programme of Conferences, Lectures and Study Visits*

We have already held a successful half-day online conference at the end of January on Women of Medieval Wales and the Marches. Today, our AGM is followed by a talk by Chris Jones-Jenkins on the work in progress to reconstruct Wigmore Castle. Our Spring Conference in May will explore 'Landscapes of the Marches', whilst the John Grove Memorial Lecture in June will be given by Professor David Carpenter. The study trip at the start of September will explore '*The Landscape of the Battle of Evesham*'. The Autumn Symposium in October will provide Society members an opportunity to give talks based on their research, whilst the half-day conference in November will look at aspects of '*Wales and the Wars of the Roses*'.

### *Other events and activity*

This year we will be sponsoring three sessions at the *Leeds International Medieval Congress, 1<sup>st</sup> –4<sup>th</sup> July 2024*; the 2023 MHS Essay Prize will be judged in March, to be followed by the launch of the 2024 Prize. The next MHS Journal will be published in the early summer. The fundraising for the 2024 Research Bursary has started, and The *Online Seminar Group: Medieval Wales and the Marches* continues throughout the year. The 2024 programme of work with primary schools is being finalised, and the Medieval Documents Research Group has a study weekend in March and will continue to meet online every two to three weeks.

Although there is much to look forward to in 2024, the Trustees are already making plans for 2025 when we mark the 600<sup>th</sup> anniversary of the death of last male Mortimer of Wigmore, when Edmund Mortimer, 5<sup>th</sup> earl of March died in 1425. A number of exciting ideas are being discussed. If any members have ideas to mark the anniversary that can be considered, please let us know.

## **Trustees of the Mortimer History Society, March 2024**

## Balance Sheet detailed

	As at 31/12/2023	As at 31/12/2022
<b>Current assets</b>		
A01: Lloyds Acct	13,539	18,974
A02: Float	50	50
A03: Paypal Acct	3,610	1,079
A04: Debtors	—	—
A08: Shop, Stock at Sale Price	1,826	2,925
<b>Total Current assets</b>	<b>19,026</b>	<b>23,028</b>
<b>Liabilities</b>		
L03: Cheques Not Yet Cleared	—	—
<b>Total Liabilities</b>	<b>—</b>	<b>—</b>
<b>Net Asset surplus (deficit)</b>	<b>19,026</b>	<b>23,028</b>
<b>Reserves</b>		
Excess / (deficit) to date	(4,002)	4,560
Z01: Starting balances	23,028	18,468
<b>Total Reserves</b>	<b>19,026</b>	<b>23,028</b>

M. G. Beasley  
Treasurer  
5 January 2024

Represented by Funds		
Unrestricted	14,318	17,710
Designated	1,916	3,029
Restricted	2,791	2,288
Endowment	—	—
<b>Total</b>	<b>19,026</b>	<b>23,028</b>

N. J. Lawrence  
Examiner  
18/02/2024

## Mortimer History Society - 1171392

**Balance sheet (Separate funds)**  
**As at: 31 December 2023**

	General Fund	Designated Funds	Restricted Funds	Endowment Funds	At 31/12/2023 £	At 31/12/2022 £
<b>Current assets</b>						
Stocks and work in progress	1,826	—	—	—	1,826	2,925
Cash at bank and in hand	12,491	1,916	2,791	—	17,199	20,103
<b>Current assets</b>	<b>14,318</b>	<b>1,916</b>	<b>2,791</b>	<b>—</b>	<b>19,026</b>	<b>23,028</b>
<b>Net current assets less current liabilities</b>	<b>14,318</b>	<b>1,916</b>	<b>2,791</b>	<b>—</b>	<b>19,026</b>	<b>23,028</b>
<b>Total assets less current liabilities</b>	<b>14,318</b>	<b>1,916</b>	<b>2,791</b>	<b>—</b>	<b>19,026</b>	<b>23,028</b>
<b>Total net assets less liabilities</b>	<b>14,318</b>	<b>1,916</b>	<b>2,791</b>	<b>—</b>	<b>19,026</b>	<b>23,028</b>
<b>Represented by</b>						
<b>Unrestricted</b>						
Unrestricted - General fund	14,318	—	—	—	14,318	17,710
<b>Designated</b>						
Designated - Events Cancellation Fund	—	1,000	—	—	1,000	1,000
Designated - Research Fund	—	916	—	—	916	2,029
<b>Restricted</b>						
Restricted - Bursary Fund	—	—	—	—	—	—
Restricted - Mortimer History Trail	—	—	—	—	—	—
Restricted - Schools and Colleges Cancellation Fund	—	—	1,430	—	1,430	1,430
Restricted - Schools and Colleges Fund	—	—	1,361	—	1,361	858
<b>Funds of the charity</b>	<b>14,318</b>	<b>1,916</b>	<b>2,791</b>	<b>—</b>	<b>19,026</b>	<b>23,028</b>

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

**Analysis of income and expenditure**  
**Selected period: 01 January 2023 to 31 December 2023**

	Unrestricted	Designated	Restricted	Endowment	This year	Total Last year
<b>Income and endowments</b>						
<b>Donations and legacies</b>						
101 - Subscriptions	5,877	—	—	—	5,877	5,608
102 - Donations	1,082	—	788	—	1,870	1,897
104 - Gift Aid	1,120	—	—	—	1,120	897
<b>Donations and legacies Totals</b>	<b>8,079</b>	<b>—</b>	<b>788</b>	<b>—</b>	<b>8,868</b>	<b>8,404</b>
<b>Income from charitable activities</b>						
212 - John Grove Lecture	1,256	—	—	—	1,256	382
201 - Living History Income	—	—	2,920	—	2,920	2,686
203 - Research Project Income	—	—	—	—	—	467
204 - Early Spring Conf Income	1,005	—	—	—	1,005	340
205 - AGM Income	—	—	—	—	—	60
206 - Spring Conf Income	2,327	—	—	—	2,327	2,943
207 - Summer Visit Income	6,996	—	—	—	6,996	1,884
208 - Autumn Symp Income	2,056	—	—	—	2,056	1,409
209 - Late Autumn Conf Income	733	—	—	—	733	1,085
210 - Mortimer Journal Income	64	—	—	—	64	47
211 - Other Talks and Tours Income	250	—	—	—	250	88
<b>Income from charitable activities Totals</b>	<b>14,631</b>	<b>—</b>	<b>2,920</b>	<b>—</b>	<b>17,551</b>	<b>11,414</b>
<b>Other trading activities</b>						
301 - Sale of Stock	183	—	—	—	183	1,843
<b>Other trading activities Totals</b>	<b>183</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>183</b>	<b>1,843</b>
<b>Other income</b>						
501 - Other Income	330	—	—	—	330	—
<b>Other income Totals</b>	<b>330</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>330</b>	<b>—</b>
<b>Income and endowments Grand totals</b>	<b>23,284</b>	<b>—</b>	<b>3,708</b>	<b>—</b>	<b>26,993</b>	<b>21,662</b>

**Expenditure****Raising funds**

E306 - Paypal Charges	81	—	—	—	81	79
E307 - Subs Refunds	14	—	—	—	14	—
E101 - Website Costs	336	—	—	—	336	236
E102 - Purchase of Stock	1,699	—	—	—	1,699	1,211
<b>Raising funds Totals</b>	<b>2,131</b>	<b>—</b>	<b>—</b>	<b>—</b>	<b>2,131</b>	<b>1,526</b>

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

	Unrestricted	Designated	Restricted	Endowment	This year	Total Last year
<b>Expenditure on charitable activities</b>						
E214 - John Grove Lecture	937	—	—	—	937	323
E308 - Bursary Payments	—	—	1,000	—	1,000	—
E201 - Marketing	595	—	—	—	595	398
E202 - Living History Project Costs	—	—	2,417	—	2,417	2,609
E203 - Mort Hist Trail Costs	—	—	—	—	—	14
E204 - Research Project Costs	—	1,112	—	—	1,112	2,604
E205 - Early Spring Conf Costs	116	—	—	—	116	311
E207 - Spring Conf Costs	2,807	—	—	—	2,807	2,511
E208 - Summer Study Visit Costs	6,422	—	—	—	6,422	1,953
E209 - Autumn Symp Costs	1,604	—	—	—	1,604	1,601
E210 - Late Autumn Mini-Conf Costs	1,338	—	—	—	1,338	445
E211 - Newsletter Costs	1,060	—	—	—	1,060	960
E212 - Mortimer Journal Costs	5,815	—	—	—	5,815	460
E213 - Other Talks and Tours	2,994	—	—	—	2,994	748
<b>Expenditure on charitable activities Totals</b>	23,692	1,112	3,417	—	28,222	14,942
<b>Other expenditure</b>						
E206 - AGM Costs	—	—	—	—	—	67
E301 - Governance Costs	190	—	—	—	190	261
E302 - Trustee Expenses	49	—	—	—	49	229
E303 - Insurance Costs	75	—	—	—	75	—
E304 - Miscellaneous Costs	252	—	—	—	252	—
E305 - Software Costs	75	—	—	—	75	75
<b>Other expenditure Totals</b>	641	—	—	—	641	632
<b>Expenditure Grand totals</b>	26,465	1,112	3,417	—	30,995	17,102

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



Section A

Independent Examiner's Report

Report to the trustees/  
members of

Charity Name

MORTIMER HISTORY SOCIETY

On accounts for the year  
ended

31/12/2023

Charity no  
(if any)

1171392

Set out on pages

1-5

(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 31/12/2023

Responsibilities and  
basis of report

As the charity trustees of the Trust, 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 the applicable Directions given by the Charity Commission  
under section 145(5)(b) of the Act.

Independent  
examiner's statement

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

- accounting records were not kept in accordance with section 130 of  
the 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:

18/02/2024

Name:

NATASHA JAYNE LAWRENCE

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

Address:

41 WESTCROFT, LEOMINSTER  
HEREFORDSHIRE  
HR6 8HF



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

31/12/2023

Charity no  
(if any)

117392

Set out on pages

1-5

(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 31/12/2023

Responsibilities and  
basis of report

As the charity trustees of the Trust, 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 the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent  
examiner's statement

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

- accounting records were not kept in accordance with section 130 of the 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: 18/02/2024

Name: NATASHA JAYNE LAWRENCE

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

Address: 41 WESTCROFT, LEOMINSTER  
HEREFORDSHIRE  
HR6 8HF