

Totnes Heritage Trust

England & Wales · Charity number 1182256

Details

Other names ST. MARY'S TOTNES HERITAGE TRUST, Totnes Heritage Trust

Status Registered

Legal form CIO

Registered 2019-02-28

Register [View on the Charity Commission register](#)

Contact

Address Golden October
Jubilee Road
Totnes
TQ9 5BP

Phone 01803840259

Email chair@stmarystotnesheritagetrust.org

Website www.stmarystotnesheritagetrust.org

Activities

Objects: THE OBJECTS OF THE CIO ARE: (1) THE CONSERVATION FOR THE PUBLIC BENEFIT OF THE HISTORICALLY-SIGNIFICANT MEDIAEVAL PARISH CHURCH OF ST. MARY'S IN TOTNES, AND THE OUTSTANDING HERITAGE AREA AROUND IT AND OTHER SITES OF RECOGNISED HERITAGE IMPORTANCE IN TOTNES BY:(A) REPAIRING, RESTORING, RENEWING AND REDEVELOPING THE BUILDING, STRUCTURE, FABRIC AND INTERIOR OF ST. MARY'S, AND ITS SURROUNDS, FOR THE BENEFIT AND EDUCATION OF THE GENERAL PUBLIC IN THE FIELDS OF LOCAL AND ECCLESIASTICAL HISTORY AND HERITAGE, EITHER THROUGH USING FUNDS RAISED DIRECTLY AS PROJECT MANAGER, OR BY GIVING GRANTS TO OTHER ORGANISATIONS TO ENABLE THEM TO CARRY OUT SUCH PROJECT MANAGEMENT;(B) PROVIDING FUNDING TO EXTEND PROACTIVE CONSERVATION AND ENHANCEMENT WORKS TO BUILDINGS AND LANDSCAPES OF HERITAGE IMPORTANCE WITHIN TOTNES, USING SUCH FUNDS RAISED DIRECTLY AS PROJECT MANAGER FOR THOSE WORKS, OR BY GIVING GRANTS TO OTHER ORGANISATIONS TO ENABLE THEM TO CARRY OUT SUCH WORKS.(2) TO PROMOTE FOR THE BENEFIT OF THE INHABITANTS OF THE PARISH OF ST. MARY'S TOTNES THE PROVISION OF FACILITIES FOR RECREATION OR OTHER LEISURE TIME OCCUPATION OF INDIVIDUALS WHO HAVE NEED OF SUCH FACILITIES BY REASON OF THEIR YOUTH, AGE, INFIRMITY OR DISABLEMENT, FINANCIAL HARDSHIP OR SOCIAL AND ECONOMIC CIRCUMSTANCES OR FOR THE PUBLIC AT LARGE IN THE INTERESTS OF SOCIAL WELFARE AND WITH THE OBJECT OF IMPROVING THE CONDITION OF LIFE OF THE SAID INHABITANTS.

Activities: The Trust raises funds to enable publicly important heritage restoration and conservation works to take place in the town of Totnes, Devon, as well as promoting the development of heritage community engagement projects, within the town. The first, and primary, project of the Trust is the restoration and development of St. Mary's Parish Church and its surrounding churchyard.

Classification

- **How:** Makes Grants To Organisations, Provides Services, Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body
- **What:** Education/training, Arts/culture/heritage/science, Environment/conservation/heritage, Recreation
- **Who:** Children/young People, Elderly/old People, Other Charities Or Voluntary Bodies, The General Public/mankind

Geography

- Devon

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£12,250	£11,080	-	-
2023-12-31	£12,510	£43,585	-	-
2022-12-31	£12,877	£2,527	-	-
2021-12-31	£39,593	£9,601	-	-
2020-12-31	£2,849	£5,029	-	-

Trustees

Name	Role	Appointed
JOHN PERCY BIRCH	Chair	2018-08-20
Alexander Ringsmith		2025-04-09
EMILY HARRIET PRICE		2019-02-27
GEORGINA ALLEN		2019-02-27
John Malcolm Anderson		2019-03-28
Lynne Jennifer Birch		2019-03-28
Penny Martin		2020-10-26
Zoe Caroline Trevor		2020-11-12

Totnes Heritage Trust

England & Wales - Charity number 1182256

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ST MARY'S TOTNES HERITAGE TRUST - CHAIR'S REPORT 2024

Following the handover of the St Mary's Church restoration project to the Reverend Jim Barlow, Totnes Rector, the trustees were keen to embrace a new venture which would raise the profile of the trust as one of the key heritage organisations in the town.

In early April we wrote to all the heritage organisations and invited them to a meeting to discuss the possibility of holding a heritage festival. The meeting was well attended and the suggestion was met with enthusiasm.

It was agreed that the festival would be a free festival and included Totnes Castle (English Heritage) who allowed free entry for the day for anyone with a local postcode which was a great draw. The date was set for the last Saturday in September when local people would be back from holidays and yet there would still be visitors in Totnes and other parts of South Devon.

The planning was carried out with the trust acting as the umbrella organisation, working with all the other heritage organisations who created their own events for the trust to coordinate into an exciting programme. At this stage the Marketing Department of the Totnes Town Council offered to come on board and prepare the programme for printing which was very welcome.

Publicity was widespread and consisted of social media publicity, a feature in the local free directory which is delivered to every household in Totnes and the printing of 2000 programmes for distribution around the town.

The festival was a huge success and exceeded expectations. The town was crowded all day and, although it was all free, many festivalgoers made donations to the individual organisations as they visited the many venues and enjoyed the events.

Most significantly, the festival dramatically raised the profile of the heritage trust and it is envisaged it can be established as a regular event in the Totnes calendar with the heritage trust as the lead organisation.

Emily Price

Chair

1 August 2025

St Mary's Totnes Heritage Trust

Income & Expenditure Account for the St Mary's Totnes Heritage Trust For the year ended 31 December 2024 4

Registered Charity Number 1182256

INCOME	2024	2023
	£	£
Donations	8764	8578
Donation Station	826	1097
Gift Aid	2572	2056
Crowdfunder	0	0
Events	0	519
Grants	0	0
Totnes PCC	0	0
Sales	0	0
Interest	88	260
Total income	<u>12,250</u>	<u>12,510</u>
EXPENDITURE		
Donation Station	186	186
Totnes PCC	9,380	40,075
Trustee Expenses	-	-
Publicity	-	-
Consultant.	1,000	-
Printing	-	-

Donations return	-	-
Events Costs	381	2,500
Miscellaneous	133	260
		564
Total expenditure	<u>11,080</u>	<u>43,585</u>

Balance sheet for the St Mary's Totnes Heritage Trust as at 31 December 2024

	2024	2023
	£	£
CURRENT ASSETS		
Balance at bank	4462	2,380
Savings Account	<u>7131</u>	<u>8,043</u>
	<u>11593</u>	<u>10,423</u>

Totnes Heritage Trust

England & Wales - Charity number 1182256

Accounts

TOTNES HERITAGE TRUST

ANNUAL REPORT FOR 2023

Following five years of assisting St Mary's Church in the development of its Renovation and Reordering Project, the Totnes Heritage Trust in January 2023 handed over the management of the project to the Totnes with Bridgetown Parochial Church Council under the leadership of Reverend Jim Barlow.

The Heritage Trust is pleased to have been associated and involved with the St Mary's Church project and wishes the project team and the Totnes with Bridgetown Parochial Church Council every success in bringing about its completion.

The Trust managed the St Mary's project from 2018 to January 2023 and during this time achieved amongst other things the following.

1. Worked with architects and consultants to produce a scheme for the renovation and reordering of St Mary's Church.
2. Organised two public consultations in St Mary's together with the setting up of the exhibition area with touchscreen, donation station and Totnes Map. Touchscreen survey produced over 700 responses.
3. Managed and organised the much needed external conservation works project costing £180,000, including securing the funding.
4. Secured a funding award of £100,000 from National Lottery Heritage Fund to enable the development works to proceed. Laying the foundation for an award of £450,000 for delivery stage.
5. Arranged appointment of key consultants for the project including architect, heating consultant, heritage engagement consultant and interpretation consultant.
6. Raised £39,000 for the project, part of which was through a major Crowdfunding campaign.
7. Organised community events to raise the profile and awareness of the project
8. Set up websites and social media sites to promote the project.
9. Regular local publicity reporting on progress and promoting the project via local newspapers and social media.

During the year of 2023 the Totnes Heritage donated the sum of just over £40,000 to the Totnes with Bridgetown Parochial Church Council towards the St Mary's Project.

The Trust during 2023 explored ways in which it could be involved in other local heritage projects. Meetings were held with the trustees of The Mansion in Fore Street, Totnes on the possibility of the Totnes Heritage Trust working in partnership in putting together a renovation scheme for The Mansion as a listed building.

The Trust also held discussions with the Totnes Town Council on assisting it in the preparation of a proposed community based scheme for the development of the Lower Field at KEVICC school in Totnes with a view to seeking financial partners to assist in the purchase of the site. The Trust raised funds to enable a consultant to be appointed to commence the drafting of a scheme.

St Mary's Totnes Heritage Trust

Income & Expenditure Account for the St Mary's Totnes Heritage Trust For the year ended 31 December 2023

Registered Charity Number 1182256

INCOME	2022	2023
	£	£
Donations	6958	8578
Donation Station	1623	1097
Gift Aid	1519	2056
Crowdfunder	0	0
Events	2060	519
Grants	0	0
Totnes PCC	699	0
Sales	0	0
Interest	18	260
Total income	<u>12,877</u>	<u>12,510</u>
EXPENDITURE		
Donation Station	399	186
Totnes PCC	-	40,075
Trustee Expenses	-	-
Publicity	1,141	-
Merchandise	-	-
Printing	132	-
Consultants	-	-
Donations return	-	2,500
Events Costs	603	260
Miscellaneous	250	564
Total expenditure	<u>2,527</u>	<u>43,585</u>
Surplus for the year	10,351	- 31,075
Balance 31 Dec 22/23	<u>31,148</u>	<u>41,498</u>
Balance 31 Dec 22/23	<u>41,499</u>	<u>10,423</u>

Balance sheet for the St Mary's Totnes Heritage Trust as at 31 Decemt 22/23

CURRENT ASSETS	2022	2023
	£	£
Balance at bank	2,479	2,380
Savings Account	<u>39,019</u>	<u>8,043</u>
	<u>41,498</u>	<u>10,423</u>

J P Birch, St Mary's Totnes Heritage Trust Treasurer

Totnes Heritage Trust

England & Wales - Charity number 1182256

Accounts

Annual report 2022

In April the trust received welcome news from the National Heritage Lottery Fund that the St Mary's Project had been awarded £100,000 for the development stage of the project following the funding application submitted in November 2021.. The award enabled the project team to appoint a project architect, quantity surveyor, heating engineer, heritage and community consultants and a heritage interpretation planner to proceed with the development stage works and activities.

A project team was established with representatives from the trust and St Mary's parochial church council and in September a faculty application for the project was submitted to the Diocese Advisory Committee ("DAC") based in Exeter and which was followed by a meeting of the project team with the DAC and historic advisory associations. Following the meeting revised proposals to the project were made and submitted to the DAC. At the year end the faculty application remained to be determined.

The trust's architect's plans to improve St Mary's Churchyard were approved by the Public Realm and Assets Committee of the Totnes Town Council. It is hoped that this project will move forward once the funding for the reordering of St Mary's Church interior has been completed and sufficient funds are in place.

Fund raising for the St Mary's Project continued throughout the year with regular concerts held in St Mary's Church. The trust supported the Totnes Summer Festival with a publicity stall in the church where many of the festival events were held and by organising various events.

The trust's links with Plymouth University were strengthened with the appointment of further internships, all of which were related to heritage projects such as the Sir Gilbert Scott reordering papers.

Throughout the year members of the parochial church council were kept informed of developments that included, for the benefit of new members to the council, a presentation on the development of the project from its conception to the present day.

The trust, throughout the year, publicised its activities and the progress on the St Mary's Project by regular articles on its websites and social media sites as well as monthly features within the Totnes Directory distributed throughout Totnes.

St Mary's Totnes Heritage Trust

Income & Expenditure Account for the St Mary's Totnes Heritage Trust For the year ended 31 December 2022

Registered Charity Number 1182256

INCOME	2022
	£
Donations	6958
Donation Station	1623
Gift Aid	1519
Crowdfunder	0
Events	2060
Grants	0
Totnes PCC	699
Sales	0
Interest	18
Total income	<u><u>12,877</u></u>
EXPENDITURE	
Donation Station	399
Totnes PCC	-
Trustee Expenses	-
Publicity	1,141
Merchandise	-
Printing	132
Consultants	-
Architect	-
Events Costs	603
Miscellaneous	250
Total expenditure	<u><u>2,527</u></u>
Surplus for the year	10,351
Balance 31 December, 2021	<u>31,148</u>
Balance 31 December 2022	<u><u>41,498</u></u>

Balance sheet for the St Mary's Totnes Heritage Trust as at 31 December 2022

CURRENT ASSETS	2022
	£
Balance at bank	2,479
Savings Account	<u>39,019</u>
	<u><u>41,498</u></u>

J P Birch, St Mary's Totnes Heritage Trust Treasurer
08 August 2023

2021

£

3892

3582

3977

20029

1106

6500

0

505

1

39,593

203

961

650

425

424

730

2,292

3,000

381

534

9,601

29,992

1,156

31,148

2021

£

6,147

25,001

31,148

Totnes Heritage Trust

England & Wales - Charity number 1182256

Accounts



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	January	2021		31	December	2021

Section A Reference and administration details

Charity name	St Mary's Totnes Heritage Trust		
Other names charity is known by	Totnes Heritage Trust		
Registered charity number (if any)	1182256		
Charity's principal address	The Rectory		
	Northgate		
	Totnes, Devon		
	Postcode	TQ9 5NX	

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
6	Emily Price			
5	Georgina Allen			
4	James Barlow			
7	John Anderson			
1	John Birch	Hon Chair		
2	Lynne Birch	Hon Secretary		
8	Penny Martin			
9	Susan Stabler			
3	Zoe Shearman			
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Trust
Trustee selection methods (eg. appointed by, elected by)	By invitation (with unanimous agreement of the trustees)

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The conservation for the public benefit of the historically significant mediaeval parish church of St Mary's in Totnes, and the outstanding heritage area around it and other sites of recognised heritage importance in Totnes.

The Totnes Heritage Trust in partnership with the local parochial church council is planning to start the development phase of the St Mary's Church Project in the April 2022. The building is urgently in need of repair and is on Historic England's 'At risk' register. The Victorian floor tiles are breaking up, and the pews are on a timber platform built over shifting Victorian rubble.

A recent architect's report states: *'It is now essential that the nettle of major works is grasped ...the tiled floor repairs have been deemed most urgent since 2004..... It is my advice that the proper repair of the building can only be addressed with a programme of very substantial works, and it is appropriate that these should be considered along with changes to make the building more sustainable.'*

Public consultations on the changes required in the church have taken place and there is universal support for the need for sympathetic change and enhancements that would bring better facilities to enable more use and improved accessibility together with a much need community facility in the centre of our town.

During 2021 the Trust has endeavoured to raise awareness locally of the value of the building to the community through monthly local press releases, events in the church with local musicians and artists, organising a roadshow for the town with Exeter Cathedral to bring heritage of local interest from the cathedral to the church. In February 2021 the Trust launched a crowdfunding appeal that raised £20,000 towards the proposed works. The Trust successfully applied for a grant from the government's Culture Recovery Fund that enabled the church to carry out urgent external repairs. In May the Trust ran a one week pop up shop in the centre of the town to publicise its work and sell a small range of merchandise and church tours and a church activity trail were run during the week. A short story competition, based on the Trust's large Totnes Heritage Map based in the church was launched and ran successfully throughout the summer with a prize giving in the church in October.

An internship was arranged in partnership with Plymouth University to catalogue the records and papers pertaining to the Victorian reordering of the church. The work was carried out by a postgraduate historian and supervised by one of the trustees whose employment is as a curator of one of Devon's largest National Trust properties.

Plans were put in place for improvements to the St Mary's Churchyard.

The trustees have had regard to the guidance issued by the Charity Commission on public benefit

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

1. £20,000 raised from Crowdfunding campaign
2. Extensive external urgent repairs carried out to St Mary's Church as a result of the award from the government's Culture Recovery Fund.
3. In partnership with Totnes with Bridgetown PCC a major funding application was submitted to the National Lottery Heritage Fund for the St Mary's Church Project
4. An internship was arranged in partnership with Plymouth University to catalogue the records and papers pertaining to the Victorian reordering of the St Mary's Church.
5. Commissioned local landscape architect to draw up plans for improvements to St Mary's Churchyard to enhance its use as a public space

Section E

Financial review

Brief statement of the charity's policy on reserves

The trust holds in reserve the funds it has raised as a contribution towards the St Mary's Church Project. These funds have been placed in a designated savings account.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Section F

Other optional information

Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	John Birch	
Full name(s)	John Percy Birch	
Position (eg Secretary, Chair, etc)	Chair	
Date	13 May 2022	

St Mary's Totnes Heritage Trust

Income & Expenditure Account for the St Mary's Totnes Heritage Trust For the year ended 31 December 2021

Registered Charity Number 1182256

INCOME	2021
	£
Donations	3892
Donation Station	3582
Gift Aid	3977
Crowdfunder	20029
Events	1106
Grants	6500
Sales	505
Interest	1
Total income	<u><u>39,593</u></u>

EXPENDITURE	
Donation Station	203
Totnes PCC	961
Trustee Expenses	650
Publicity	425
Merchandise	424
Printing	730
Consultants	2,292
Architect	3,000
Events Costs	381
Miscellaneous	534
Total expenditure	<u><u>9,601</u></u>
Surplus for the year	29,992
Balance 31 December, 2020	<u>1,156</u>
Balance 31 December 2021	<u><u>31,148</u></u>

Balance sheet for the Totnes Team Ministry as at 31 December 2021

CURRENT ASSETS	2021
	£
Balance at bank	6,147
Savings Account	<u>25,001</u>
	<u><u>31,148</u></u>

J P Birch, St Mary's Totnes Heritage Trust Treasurer
31 January 2021

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2020

£

1345

1004

-

-

500

-

-

-

2,849

186

168

180

4,000

495

5,029

- 2,180

3,336

1,156

2020

£

1,156

1,156



CHARITY COMMISSION
FOR ENGLAND AND WALES

**Independent
examiner's
report on the
accounts**



Report to the trustees of	St Mary's Totnes Heritage Trust		
On accounts for the year ended	31 st December 2021	Charity no (if any)	1182256
Set out on pages	1		
Respective responsibilities of trustees and examiner	<p>The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.</p> <p>It is my responsibility to:</p> <ul style="list-style-type: none"> • examine the accounts under section 145 of the Charities Act, • to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and • to state whether particular matters have come to my attention. 		
Basis of independent examiner's statement	<p>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.</p>		
Independent examiner's statement	<p>In connection with my examination, no material matters have come to my attention which gives me cause to believe that in, any material respect:</p> <ul style="list-style-type: none"> • accounting records were not kept in accordance with section 130 of the Charities Act or • the accounts do not accord with the accounting records <p>I 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.</p>		
Signed:		Date:	7/3/22
Name:	GILLIAN TAYLOR		
Relevant professional qualification(s) or body (if any):	LLB and retired solicitor		

20 Barn Court Rd
Berry Pomeroy
Totnes
TQ9 695

Totnes Heritage Trust

England & Wales - Charity number 1182256

Accounts



Charity name ST. MARY'S TOTNES HERITAGE TRUST.

Charity number (if any) 1182256.

For the period from (start date) 010120

to (end date) 311220

Section A Receipts and payments					
	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
DONATIONS	1345			1345	4215
MAP FEE INCOME	0			0	1170
SALES	0			0	40
E. BOX CREDIT	0			0	79
E. BOX DONATIONS	1004			1004	59
EVENTS - FUNDRAISING	500			500	961
Sub total	2849			2849	6524
A2 Asset and investment sales, etc					
	NIL			NIL	NIL
Total receipts	2849			2849	6524
A3 Payments					
WEBSITE	0			0	534
PROMOTION	180			180	465
EVENTS COST	250			250	170
MAP COST	0			0	464
E. DONATION BOX	186			186	955
CONSULTANTS	4,000			4,000	510
EXHIBITION COST	0			0	150
MARTINGTON PLAYERS	245			245	0
PCC	168			168	0
Sub total	5029			5029	3188
A4 Asset and investment purchases, etc					
	NIL			NIL	
Total payments	5029			5029	3188
Net of receipts/(payments)	2180			2180	3336
A5 Transfers between funds					
	NIL			NIL	NIL
A6 Cash funds last year end					
	3336			3336	NIL
Cash funds this year end	1156			1156	3336

Statement of assets and liabilities at the end of the period

	Details	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
B1 Cash funds	LOFIS BANK	1156	NIL	NIL.
	<i>Total cash funds (agree balances with receipts and payments account(s))</i>	1156	NIL	NIL.


	Details	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £
B2 Other monetary assets	NIL			

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	NIL			

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use	NIL			

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities	NIL.			

Signed by one or two trustees on behalf of all the trustees

Signature	Print name	Date of approval
	JOHN P. BIRCH	