

Trustees' Annual Report for the period 1 April 2023 - 31 March 2024



Abbey Cwmhir
Heritage Trust

*Ymddiriedolaeth
Treftadaeth
Abaty Cwmhir*

Reference and Administrative details

Name of Charity: Abbey Cwmhir Heritage Trust
Charity No: 1196905
Principal address: Ty'r Ehedydd, Abbeycwmhir, Powys LD1 6PL

Current Trustees:

Roger Coward
Julian Lovell - Secretary
Jackie Marriott - Treasurer & Membership Secretary
Sian Meredudd
Mel Walters
Phil Olivant
Angela Swindell (appointed as a Trustee 30 March 2024)

Past Trustees:

John Hughes (resigned as a Trustee 31 March 2024)

The report of achievements and performance below covers the 12 month period from April 2023 to March 2024.

Objectives and Activities

The Trust's Object is to advance the education of the public in the preservation and the historical and cultural importance of Cwmhir Abbey through the provision of information, events, research and continued learning.

The Trust carries out a range of activities, many of which are focussed on Community Heritage under the project 'Demystifying the Abbey'.

Our activities include:

- Assistance to Cadw in the content of the Exhibition Room at the Abbey ruins.
- Hosting a series of on-line talks that are open to the public

Trustees' Annual Report for the period 1 April 2023 - 31 March 2024



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- Providing a public facing newsletter summarising the Trust's research and community activities
- Offering the opportunity for volunteers to become involved in research activities associated with the Trust's aims. This includes both desk based research and field based activities
- Provision of training events associated with the Trust's research
- An annual memorial service for Llywelyn ap Gruffydd
- Maintaining our on-line presence through a website and social media

The Trust is extremely grateful for the substantial support provided by many volunteers. None of the activities above would be possible without their contribution. We are also most grateful to the Hamer family for allowing public access to the abbey ruins.

Abbey Cwmhir Heritage Trust can confirm that they have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The Trust has installed two new display boards at the Exhibition Room and the Abbey ruins and the new facilities were officially opened by Will Davies of Cadw in October 2023.

The Trust's relationship with Prof Austin remains strong and productive. Our ongoing research will lead to the preparation of a book on Cwmhir Abbey within the series 'Strata Florida Books' <https://www.facebook.com/YstradFflur/posts/3089811434576204/>. Prof Austin continues to support us with our research and our team have had a number of meetings with him during the period.

As part of our research, Julian Ravest continues to conduct drone photogrammetry of a number of sites of interest to us.

We continue to have meetings of our Research Discussion Group by zoom and recordings of these discussions are placed on our website and made available to the public. The Research Group have also had the opportunity to hold Q&A discussions with Dr David Stephenson. Members of the team visited Tintern Abbey in November, and Will Davies of Cadw hosted the visit to the restoration and excavation works on-going there.

In 2023 we continued archaeological excavations at Cwmffwrn Farm in the Abbey Home Grange. Our public excavation on 24/25th June 2023 was attended by a total of 29 people and supervised by Trysor Archaeological Services. It was supported by a grant from Local

Trustees' Annual Report for the period 1 April 2023 - 31 March 2024



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Giving. Cwmffwrn Farm is owned by Angela and Ian Lewis and we thank them for their interest in our research and their permission for us to survey and excavate on their farm.

We have subsequently been awarded a grant by PAVO from the Levelling Up fund that will enable further excavations at Cwmffwrn Farm in 2024.

We were awarded a grant from Catalyst Cymru that enabled our team to receive training from professional archaeologists in the recording and archiving of excavation information. This training was delivered by Trysor Archaeological Services on 29th November 2023.

We hosted 4 on-line talks during the period:

- 28th September 2023 *Piety and Peril: medieval monastic foundation and consequent violence* by Dr David Stephenson
- 2nd November 2023 *Creature Comforts in Medieval Mid-Wales* by Prof Marged Haycock
- 7th December 2023 *Pilgrimage in Wales: then and now* by Prof Madeleine Gray
- 21st March 2024 *Chronicles and Capitals: the cultural impact of Welsh Border Cistercians - Cwmhir, Strata Marcella, Valle Crucis and Llanllugan* by Amy Reynolds

In addition Sorcha Lewis gave a talk at our AGM on 13th May 2023 entitled: *Through the generations: a story of High Nature Value traditional farming systems; connecting history, community and biodiversity through time.*

We are most grateful to our speakers for the time and contribution that they have made to the Trust. Recordings of these talks have been placed on Youtube with links from our website.

The Trust uses the eventbrite.com donation method to manage the ticketing process for non-members access to on-line talks. The donation approach has resulted in £882.44 donations made towards the Trust's heritage research fund over the period 1 April 2023 to 31 March 2024.

We are members of Council for British Archaeology (CBA) Wales and we hosted a successful CBA Wales public meeting in June 2023 at Abbeycwmhir. A number of our research team gave short talks at the meeting and Julian Lovell gave a tour of the abbey.

Trustees' Annual Report for the period 1 April 2023 - 31 March 2024



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We offer bespoke tours of the abbey and village, advertised through our website. The groups donate to our heritage research fund. These tours are proving very successful and this year a tour has been conducted for the Cambrian Mountains Society.

The heritage walks that were created by a grant from Cadw and National Lottery Heritage Fund in 2020/1 continue to be popular, with route descriptions provided on our website, in the Exhibition Room at the Abbey, on the village notice board and at some local B&Bs.

A public facing newsletter describing some of the Trust's activities was prepared in Summer 2023 with copies made available in the Exhibition Room, the village and on our website.

We had the opportunity to provide a display of material related to the Abbey and the Trust at

- Elan Links Festival of Archaeology on 29/30th July 2023
- CPAT/CBA Wales event 11th November 2023

We are also working with CARAD museum in Rhayader to create a display related to the Abbey there.

Our website www.abbeycwmhir.org has continued to develop over the period. Our thanks are given to Julian and Naisi Ravest who manage the hosting of the website and have designed its overall structure. We also have a facebook and instagram presence and we advertise our activities on these platforms too.

Links to Other Organisations

We give our thanks to Catalyst Cymru and PAVO. Catalyst Cymru have provided our Trustees with training opportunities that have been invaluable to help us run the Trust appropriately. PAVO have also been at hand to provide advice and practical support.

We have many links with the Radnorshire Society and we would particularly like to acknowledge the importance of their library resource.

During the period various papers have been submitted to a range of journals based upon our research. These are:

We have submitted information on various sites at Cwmffwrn to Archaeology in Wales, for inclusion in their Gazetteer.

Lovell, J.. "*The Evolution of the Cwmhir Abbey Estates Post-Monastic Land Ownership*"
Radnorshire Society Transactions 2023

Trustees' Annual Report for the period 1 April 2023 - 31 March 2024



Abbey Cwmhir
Heritage Trust

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Ravest, J. *"The 1200 Mortimer charter to Abbey Cwmhir revisited"* Radnorshire Society Transactions 2023

Ravest, J. *"Survey of the Cistercian Grange Centre, Mynachdy Moat"* Archaeology in Wales 2022

Swindell, A. *"Dolhelfa: Continuity and Change in the area occupied by a former grange of Abbey Cwmhir"* Radnorshire Society Transactions 2023

Our Cwmhir walk was also featured in The Times on 26th August 2023.

Summary of the main benefits derived from the Trust's activities over this reporting period

Our beneficiaries are:

- Our local community in Abbeycwmhir and nearby
- Visitors to Abbeycwmhir
- People who are interested in landscape and heritage in mid-Wales
- People who are interested in Welsh history

The key benefits that we have achieved over the period April 2023 - March 2024 are:

- An enhanced experience for walkers in the area of Abbeycwmhir.
- An enhanced experience for visitors to the Abbey ruins and the Exhibition Room and thereby, a benefit to local tourism.
- Training opportunities for our volunteers and the public related to understanding our landscape and its heritage.
- Information provided in a varied and engaging manner to enhance people's understanding of the heritage of mid-Wales and Cwmhir Abbey and its granges.
- Opportunities for social interaction in a fun and engaging manner.

Financial Review

The fund's held by Abbey Cwmhir Heritage Trust as of 31 March 2024 are as follows:

Main Account:	£4,306.90
Deposit Account:	£6,077.28
Petty Cash:	£ 76.47
Total Funds Available:	£10,460.65

For more detailed information on Income and Expenditure please refer to the Financial Accounts, sent separately, for the period ending 31 March 2024.

Trustees' Annual Report for the period 1 April 2023 - 31 March 2024



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We hold our deposit account in reserve to enable cash flow ahead of grant income. Within our main account we hold £3,713 for our research activities.

Our principal source of funds are grants, donations and membership as detailed in the attached accounts.

Assets held by the Trust as at the end of this financial year total £16,742.86, which have accumulated over several years. The majority of these assets have been purchased during 2020 to 2023 using Grant money from National Lottery Heritage Fund, Cadw, WCVA and Magic Little Grants. The main assets include 3D Scanning models, laptop and tablet, excavation equipment, a camcorder and projector. They are currently held by Trustees or in our Exhibition Room at Home Farm, Abbeycwmhir.

During 2023/24 we have added three items to the assets of the Trust

1. Removable harddrive to store our Archived material £39.15
2. Jabra Speak 2 55 Wireless Bluetooth Speakerphone (paid for by CADW grant) £99.99
3. People Counter sited in the Exhibition Room to measure visitors (paid for by Levelling Up grant) £207.00
4. A full list of assets can be made available by request.

Subscriptions to other bodies

The Abbey Cwmhir Heritage Trust are members of:

- The Radnorshire Society
- Council for British Archeology (CBA)
- British Association for Local History (BALH - membership also includes Public Liability Insurance)

Grants Received during this period

The Abbey Cwmhir Heritage Trust have been fortunate to receive grants from:

- Catalyst Cymru Grant £960 - training for Archiving - Fully spent during this financial year
- Levelling Up Grant 2024 - approved March 2024 with 80% due in April 2024 and balance due at the end of the grant November 2024.

Membership Report

Current Membership Fees £15 Single £20 Family. These fees haven't increased for some years.

Trustees' Annual Report for the period 1 April 2023 - 31 March 2024



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We are pleased to welcome the following new members in this financial year: Jill Wiley and Christine Walmsley.

Our numbers are as follows year on year counting joint membership as 2.

No of Members as at 1 April 2024	38
No of Members as at 31 March 2024 (including 2 new members)	38

Risks and Mitigation

The two main risks that the Trust faces continue to be:

Risk	Mitigation
Insufficient Trustees to progress the activities of the Trust	Encourage new and diverse Trustees by an active recruitment process
Protection of Data	We have already taken steps to hold much of our data on Google Drive. The Trust has received training this financial year to learn how best to archive our Heritage Research. This is ongoing and will take time to ensure we have captured everything.

Structure, Governance and Management

Abbey Cwmhir Heritage Trust is a [Charitable Incorporated Organisation \(CIO\)](#) with voting members other than its charity trustees. Trustee selection methods, including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees, can be found in our Constitution.

Our Constitution and our Policies can be found on our website:

<https://abbeycwmhir.org/uncategorized/policies-and-procedures>

Trustees' Annual Report for the period 1 April 2023 - 31 March 2024



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DECLARATIONS

This report has been prepared, on behalf of the Trustees, by Mel Walters and Jackie Marriott using the guidance set out by the Charities Commission Statement of Recommended Practice (SORP).

The Trustees declare they have approved the Trustees' Report above.

Signed on behalf of the Trustees

Julian Lovell
Secretary
Abbey Cwmhir Heritage Trust

	Credit	Debit
INCOME:		
AGM	£35.00	
Donations	£288.69	
Gift Aid	£506.17	
Grants awarded:		
Catalyst Cymru	£960.00	
Interest	£64.05	
Membership	£370.00	
Online Talks and Excavation	£986.90	
Sundry	£39.15	
TOTAL INCOME:	£3,249.96	
EXPENDITURE:		
AGM		-£117.58
Assets		-£39.15
Events		-£37.44
Exhibition Room		-£65.50
Grant expenditure:		
Catalyst Cymru		-£971.99
Levelling Up Fund		-£207.00
Insurance		-£274.66
Online Resources		-£289.45
Postage, Stationery & Printing		-£31.34
Research Expenditure		-£1,165.29
Subscriptions		-£47.50
Sundry		-£124.25
		-£3,371.15
NET INCOME/EXPENDITURE:	-£121.19	

FINANCIAL ASSETS:

Lloyds Bank Account Closing Balance	£4,306.90
Lloyds Deposit Account Closing Balance	£6,077.28
Petty Cash Closing Balance	£76.47
	£10,460.65

REPRESENTED BY Reserves brought forward at 01/04/2023

Lloyds Bank Account	£4,352.19
Lloyds Deposit Account	£6,013.23
Petty Cash	£216.42
Net Income/Expenditure	-£121.19
	£10,460.65

NOTES:**Evidence in Files:**

Lloyds Treasurer's Account - Bank Statements and Print out of AHT records

Lloyds Deposit Account - Online Statement and Print out of AHT records

Membership

Eventbrite/SiEntries Online Events - Under receipts

Assets

Accounting Policies:

The income and expenditure accounts have been compiled from receipts and payments via all bank accounts and petty cash.

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Jackie Marriott

Treasurer / Trustee

Date:

Auditor's Report

I have conducted an examination, on a test basis, of the evidence relevant to the amounts and disclosures in the financial statements given above. In my opinion these statements give a true and fair view of the Trust's financial affairs as at 31st March 2024, as supported by bank statements and other evidence provided.

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Frédérique Mosley-La Gro

Auditor

Date: