

# Trustees' Annual Report for the period 1 April 2024 - 31 March 2025



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:

Julian Lovell - Secretary  
Jackie Marriott - Treasurer & Membership Secretary  
Sian Meredudd  
Mel Walters  
Phil Olivant  
Angela Swindell  
Julian Ravest - Appointed 1 April 2025

We are delighted that Julian Ravest has agreed to become a Trustee from 1 April 2025.

Julian Ravest has been part of our team of research volunteers from the outset of our Demystifying project. As well as his important drone surveying he has a valuable background in heritage activities and ongoing links to organisations such as Council for British Archaeology, Heneb and Radnorshire Society.

## Past Trustees:

Roger Coward sadly passed away January 20th 2025 after a long illness and will be greatly missed. Roger was a significant influence in the recent development of the Trust and Chairman for several years.

## 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.

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The Trust carries out a range of activities, many of which are focused 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
- Organising field visits to relevant sites
- 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
- Maintaining links with other heritage organisations
- 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 Trustees have had regard to the guidance issued by the Charity Commission on public benefit.

## **Achievements and Performance below covers the 12 month period from April 2024 to March 2025**

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.

Mortimer History Society, Cambrian Archaeological Association and Bryn Titli Fund have all agreed to provide us with grants to enable us to publish the book on Cwmhir Abbey and we are extremely grateful to these organisations for their support. Other grant applications are ongoing.

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

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Our Research Discussion Group has regular meetings by zoom and recordings of these discussions are placed on our website and made available to the public. The Research Group have also benefited from discussions with Dr David Stephenson (medieval history), Dai Hawkins (welsh placenames) and Dr David H Williams has very kindly helped us transcribe a survey of Cwmhir Abbey conducted at the time of the dissolution of the monasteries. He has also donated some of his reference books to the Abbey Cwmhir Trust library.

In 2024 we continued archaeological excavations at Cwmffwrn Farm in the Abbey Home Grange. Our public excavation on 12-15<sup>th</sup> June 2024 was supervised by Trysor Archaeological Services. It was supported by a Cohesive Communities Levelling Up grant. 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. Trysor consider that the site under excavation is potentially a medieval house platform. It is of sufficient interest that excavations will continue there in July 2025. See our website for further details and how to get involved.

We hosted 4 on-line talks during the period:

- 17<sup>th</sup> October 2024 *Findings from our excavation at Cwmffwrn* by Jenny Hall & Paul Sambrook
- 14<sup>th</sup> November 2024 *The Mortimers and Cwm Hir: the 200-year struggle to control Maelienydd* by Philip Hume
- 12<sup>th</sup> December 2024 *Abbey Cwmhir and the Conservation of Cultural Identity* by Sian Rees
- 27<sup>th</sup> February 2025 *Conserving Tintern Abbey* by Will Davies

In addition Jenny Hall and Paul Sambrook gave a talk at our AGM on 11<sup>th</sup> May 2024 entitled: *Where the Monks trod: recent fieldwork in Elenydd*.

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 £462.36 donations made towards the Trust's heritage research fund over the period 1 April 2024 to 31 March 2025.

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 was conducted for the Arwystli Society. We also ran a public tour of the

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Abbey and village in October 2024 and a public tour of sites associated with the assassination of Llywelyn ap Gruffudd in June 2024.

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 in Welsh and English 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 2024 with copies made available in the Exhibition Room, the village and on our website.

We had the opportunity to provide content for a display about the abbey at CARAD museum in Rhayader.

Our website [www.abbeycwmhir.org](http://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, Instagram and Bluesky presence and we advertise our activities on these platforms too and we also advertise in local publications and the press (County Times and Broad Sheep).

## Links to Other Organisations

We give our thanks to PAVO who are always 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.

We submitted information on our Cwmffwrn excavation to the Council for British Archaeology (CBA) newsletter and we have featured in the Mortimer History Society newsletter again this year.

As well as being members of The Radnorshire Society, CBA and British Association for Local History, our Trustee - Sian Meredudd - is a member of Cofio Llywelyn and Welsh History Forum and provides a link to these organisations.

## 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

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- People who are interested in Welsh history

The key benefits that we have achieved over the period April 2024 - March 2025 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.
- Opportunities for our volunteers and the public related to understanding our landscape and its heritage and learning archaeological techniques.
- 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 funds held by Abbey Cwmhir Heritage Trust as of 31 March 2025 are as follows:

Main Account:	£5,336.17
Deposit Account:	£6,146.09
Petty Cash:	£287.50
Total Funds Available:	<b>£11,798.76</b>

For more detailed information on Income and Expenditure please refer to the Financial Accounts, sent separately, for the period ending 31 March 2025.

We hold our deposit account in reserve to enable cash flow ahead of grant income. Within our main account we hold £4,064.15 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 and have not changed this year. 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.

## Subscriptions to other bodies

The Abbey Cwmhir Heritage Trust is a member of:

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

## Grants Received during this period

The Abbey Cwmhir Heritage Trust has been fortunate to receive a grant from:

- Levelling Up Grant 2024 - approved March 2024 with 80% due in April 2024 and balance due at the end of the grant November 2024. This grant is fully paid up and now closed.
- Bryn Titli Fund - As stated above we have received £500 towards the publication of the book on Cwmhir Abbey

## Membership Report

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

Our numbers have remained constant this year as follows, counting joint membership as 2.

No of Members as at 1 April 2024	47
No of Members as at 31 March 2025	47

## 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 taken steps to hold much of our data on Google Drive. Actions to continue to store and archive Trust data effectively will be ongoing.

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## 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>

## 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

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## Abbey Cwmhir Heritage Trust - Accounts Year Ended 31 March 2025

	This Year 31/03/2025		Last Year 31/03/2024	
	Credit	Debit	Credit	Debit
<b>INCOME:</b>				
AGM	£32.45		£35.00	
<b>Donations</b>	£310.27		£288.69	
Gift Aid	£422.44		£506.17	
Grants awarded:				
Catalyst Cymru	£0.00		£960.00	
Book	£500.00			
Levelling Up	£4,992.31			
Interest	£67.81		£64.05	
Membership	£586.00		£370.00	
Online Talks and Excavation	£462.36		£986.90	
Sundry	£0.00		£39.15	
<b>TOTAL INCOME:</b>	<b>£7,373.64</b>		<b>£3,249.96</b>	
<b>EXPENDITURE:</b>				
AGM		-£89.52		-£117.58
Assets		£0.00		-£39.15
Bank Charges		-£0.52		
Events		£0.00		-£65.50
Exhibition Room		£0.00		-£37.44
Grant expenditure:				
Catalyst Cymru		£0.00		-£971.99
Levelling Up Fund		-£4,600.38		-£207.00
NHLF (Funds in reserve)		-£100.00		£0.00
Insurance		-£274.66		-£274.66
Online Resources		-£578.60		-£289.45
Paypal Costs		-£6.45		£0.00
Postage, Stationery & Printing		-£38.32		-£31.34
Research Expenditure		-£111.39		-£1,165.29
Subscriptions		-£50.00		-£47.50
Sundry		-£185.69		-£124.25
		<b>-£6,035.53</b>		<b>-£3,371.15</b>
<b>NET INCOME/EXPENDITURE:</b>	<b>£1,338.11</b>		<b>-£121.19</b>	

<b>FINANCIAL ASSETS:</b>	<b>This Year</b>	<b>Last Year</b>
Lloyds Bank Account Closing Balance	£5,366.17	£4,306.90
Lloyds Deposit Account Closing Balance	£6,145.09	£6,077.28
Petty Cash Closing Balance	£287.50	£76.47
	<b>£11,798.76</b>	<b>£10,460.65</b>
<b>REPRESENTED BY Reserves brought forward at 01/04/2024</b>		
Lloyds Bank Account	£4,306.90	£4,352.19
Lloyds Deposit Account	£6,077.28	£6,013.23
Petty Cash	£76.47	£216.42
Net Income/Expenditure	£1,338.11	-£121.19
	<b>£11,798.76</b>	<b>£10,460.65</b>



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## 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.

*J. Marriott*

Jackie Marriott  
Treasurer / Trustee

Date: *17/4/25*

### 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 2025, as supported by bank statements and other evidence provided.

*F. Mosley-La Gro*

Frédérique Mosley-La Gro  
Auditor

Date: *7<sup>th</sup> April 2025*

**Trustees' Annual Report  
for the period 1 April 2024 - 31 March 2025**



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