

Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	March	2024		31	March	2025

Section A

Reference and administration details

Charity name

Forest of Selwood

Other names charity is known by

Registered charity number (if any) 1200944

Charity's principal address

4 Fair View

North Brewham

Bruton, somerset

Postcode BA10 0JT

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)
1	Jill Butler	Chair		
2	James Coward	Treasurer		
3	Patricia Stainton			
4	Charles Couzens			
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Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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)	Charitable incorporated organisation
Trustee selection methods (eg. appointed by, elected by)	Elected at General Meeting of 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.

The charity undertook a governance review in the year supported by an external advisor which identified improvements in the governance arrangements. As a result we have drafted and approved a new suite of policies and procedures including policies on conflict of interest, code of conduct for trustees, trustee recruitment, performance review and safeguarding. We maintain a current risk register, which is reviewed at each trustee's meeting. We also began to develop a strategic plan for our work across the Forest of Selwood.

We have continued to host the Forest of Selwood Partnership which meets three times a year and provides the opportunity for organisations active in the area to share plans and develop new collaborations. We also continued to host the Selwood Farmer Facilitation Group and managed their personal data according to our Data Protection and Information Management Policies.

Section C Objectives and activities

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

Forest of Selwood is set up to achieve the following charitable objects:

- To promote the conservation of the natural and physical environment of the Forest of Selwood and its surroundings and to educate the public in its heritage.
- To advance the education and awareness of the Forest of Selwood community and the public in the principles of biodiversity conservation and sustainability.

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)

We have undertaken the following main activities which the trustees consider meets the Charity Commission guidance on public benefit. Our continued ownership and management of Long Ham Meadow in Witham Friary provides the opportunity to undertake a significant habitat creation project and use this to educate and raise awareness locally of how to revive nature. We worked to advance understanding and public education about the conservation of the rare and declining Hazel Dormouse which is closely associated with ancient wood pasture connected by riparian habitats which are key features of the Forest of Selwood landscape. We secured funding for a major study into ways in which private finance could be used to revive the landscape of the Forest of Selwood. We supported a network of farmers interested in nature restoration and ways of adopting more regenerative farming practices. We supported networking amongst organisations active in nature restoration and hosted three meetings of the Forest of Selwood Partnership.
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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.

Long Ham Meadow - During the year we undertook detailed botanical monitoring and began monitoring for Bats, Dormouse, Riverfly and Beavers, which will help us assess the long-term impact of habitat creation on site. We also made improvements to public access with work on the footpath, and installed gates and a foot bridge for better access for volunteer surveyors. This work was supported with a grant from the Cranborne Chase National Landscape FiPL programme. A local volunteer Warden is building a team of volunteers to undertake further conservation and educational activities at Long Ham Meadow. A study by the Bristol Avon Rivers Trust into the feasibility of wetland and grassland restoration was undertaken with a grant from the Environment Agency. The study identified the potential to improve the riparian environment by creating a series of connected ponds and scrapes along the meadow. Hazel Dormouse Recovery – We were able to expand our monitoring network across the Forest of Selwood with support from the CCNL FiPL grant programme. We added 12 new monitoring sites ready for regular inspection visit in the spring and autumn of 2025. We also held two community events and two training days to raise awareness of the decline of Dormouse and recruit volunteers, with approximately 70 people attending these events. A network of organisations active in Dormouse conservation in the area was also established to exchange knowledge and develop collaboration. Trained volunteers were equipped

to undertake surveys using tunnels and tubes to report on the presence of dormouse in different locations.

Finance for Nature Recovery – We secured a major grant from the DEFRA Natural Environment Investment Readiness Fund which allowed the Trust to develop new ways in which farmers and landowners could access private finance to undertake major nature restoration projects. This approach has great potential to transform the landscape of the Forest of Selwood. The project worked with several landowners and was supported by Finance Earth to assess the viability of establishing a special purpose vehicle of the charity. It was concluded that there was a need for a locally based project developer which could bring forward new nature restoration projects.

Farmer Support – We continued to support the Forest of Selwood Farmer Facilitation group and held two events in the year, one on the opportunities of the markets for ecosystem services including Biodiversity Net gain and Woodland Carbon. We also hosted a very successful screening of the film “Six Inches of Soil” followed by discussion panel of farmers including Martin Lines of the Nature Friendly Farming Network.

Policy – We continued to advocate for the importance of reviving the landscape of the Forest of Selwood and submitted a detailed response to the government’s Land Use Framework. We also were active participants in the Somerset Local Nature Partnership and commented in detail on the Wiltshire Local Nature Recovery Strategy.

Partnerships – We hosted three meetings of the Forest of Selwood Partnership which brings together the voluntary and statutory organisations active in the area to share activity, support new projects and identify areas for potential collaboration. The partnership heard about two major projects which were advanced in the year – The Western Forest which will promote woodland creation and agroforestry across the Wiltshire part of the FoS; and the Lower Wylde Landscape Recovery Project which has important lessons for work on riparian corridors.

We continued to support the Environment Agency Heart of Wessex partnership which is supporting strategic approaches to Natural Flood Management and Nature Based Solutions to flooding and water quality issues across the four headwaters that span the Forest of Selwood.

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

We have improved the management of Long ham Meadow for the public and established a clear baseline for assessing improvements in wildlife abundance and diversity at the site. A viable plan for nature restoration has been prepared.

We have raised the awareness and understanding of dormouse conservation amongst the public and built a group of volunteers able to contribute to monitoring of the population and so contribute to the local strategy for dormouse recovery. We have strengthened relationships and built credibility with local landowners who are willing to contribute to conservation of this rare and endangered mammal.

We have begun to build an expertise and understanding of how to support farmers and landowners can access the finance needed to restore nature at scale across the landscape and create new nature rich habitats that are bigger, better and more connected across the deeply historic Forest of Selwood.

We have developed a strategic plan of how to deliver the aims and objectives of the organisation and have invested in strengthening governance and internal procedures to ensure the charity is able to grow and thrive in the future.

Section E

Financial review

Brief statement of the charity's policy on reserves

Sufficient reserves are held in a general fund to ensure the running costs can be met as they fall due.

Details of any funds materially in deficit

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.

The charity has received grants from:

- Cranborne Chase National Landscape FiPL toward its work at Long Ham Meadow and on hazel Dormouse Recovery.
- DEFRA NEIRF to fund our work to enable landowners to benefit from biodiversity net gains and other offsetting credits.
- DEFRA/ EA to fund a feasibility study into wetland and meadow restoration at Long Ham Meadow.
- A loan has been made from a trustee, this was necessary to repay the original loan used to finance the purchase of Long Ham Meadow.

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)

Full name(s)

Position (eg Secretary, Chair, etc)

Date

**FOREST OF SELWOOD
UNAUDITED FINANCIAL STATEMENTS
FOR THE PERIOD 29 FEBRUARY 2024 TO 31 MARCH 2025**

Forest of Selwood Contents

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**Forest of Selwood
Company Information
For the Period 29 February 2024 to 31 March 2025**

Directors

Mr James Coward
Mrs Jill Butler
Dr Ewan Jones (resigned 19/9/24)
Mrs Patricia Stainton
Mrs Lulu Urquhart
Mr Simon Nash (resigned 31/1/25)

Company Number

12442255

Registered Office

Kingsdown House
Shepton Montague
Somerset
BA9 8JL

Accountants

James Coward FCA
4 Fair View
North Brewham
Bruton
Somerset
BA10 0JT

**Forest of Selwood
Accountant's Report
For the Period 29 February 2024 to 31 March 2025**

In accordance with the engagement letter, we have compiled the financial statements of the company from the accounting records and information and explanations you have given to us.

This report is made to the directors in accordance with the terms of our engagement. Our work has been undertaken to prepare for approval by the directors the financial statements that we have been engaged to compile, to report to the directors that we have done so, and to state those matters that we have agreed to state to them in this report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charity and the Charity's trustees for our work or for this report.

You have acknowledged on the balance sheet as at period ended 31 March 2025 your duty to ensure that the company has kept proper accounting records and to prepare financial statements that give a true and fair view.

We have not been instructed to carry out an audit of the financial statements. For this reason, we have not verified the accuracy or completeness of the accounting records or information and explanations you have given to us and we do not, therefore, express any opinion on the financial statements.



Date 28 April 2025
James Coward FCA
4 Fair View
North Brewham
Bruton
Somerset
BA10 0JT

Forest of Selwood
Income and Expenditure Account
For the Period 29 February 2024 to 31 March 2025

	31 March 2025	28 February 2024
	£	£
TURNOVER	108,201	89,677
Other income	-	12,750
Depreciation and other amounts written off assets	(249)	(312)
Other charges	(106,118)	(41,458)
NET SURPLUS	1,834	60,657

**Forest of Selwood
Balance Sheet
As At 31 March 2025**

	31 March 2025	28 February 2024
	£	£
Fixed assets	158,755	159,004
Current assets	16,510	14,426
Creditors: Amounts Falling Due Within One Year	(1)	-
NET CURRENT ASSETS	16,509	14,426
TOTAL ASSETS LESS CURRENT LIABILITIES	175,264	173,430
Creditors: Amounts Falling Due After More Than One Year	(80,000)	(80,000)
NET ASSETS	95,264	93,430
RESERVES	95,264	93,430

Notes

1. General Information

Forest of Selwood is a charity, registered number 1200944 . The registered office is Kingsdown House, Shepton Montague, Somerset, BA9 8JL.

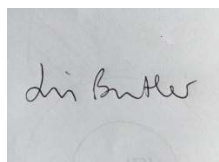
For the period ending 31 March 2025 the charity was entitled to exemption from audit.

The members have not required the charity to obtain an audit.

The trustees acknowledge their responsibilities for complying with the requirements of the Charities Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the micro-entity provisions.

On behalf of the board



Date 28 April 2025

Forest of Selwood
Detailed Income and Expenditure Account
For the Period 29 February 2024 to 31 March 2025

	31 March 2025		28 February 2024	
	£	£	£	£
TURNOVER				
Grants and subsidies received	108,154		28,907	
Donations received (general)	47		10,847	
Donations received (earmarked)	-		49,923	
		108,201		89,677
OTHER INCOME				
Other operating income		-		12,750
		108,201		102,427
DEPRECIATION AND OTHER AMOUNTS WRITTEN OFF ASSETS				
Depreciation	249		312	
		(249)		(312)
OTHER CHARGES				
Premises expenses:				
Rent	48		-	
Longham maintenance	264		19,908	
	312		19,908	
General administration costs:				
Computer software, consumables and maintenance	710		838	
Insurance	505		650	
Advertising and marketing costs	-		197	
Professional fees	1,500		124	
Longham surveys	-		1,070	
Landscape recovery scheme bid costs	-		13,210	
Dormouse project expenses	22,753		5,461	
NEIRF expenditure	80,338		-	
	105,806		21,550	
		(106,118)		(41,458)
NET SURPLUS		1,834		60,657



Section A

Independent Examiner's Report

Report to the trustees

Charity Name
Forest of Selwood

On accounts for the
period ended

31 March 2025

Charity no
(if any)

1200944

Set out on pages

3 - 5

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the 13 months ended 31 March 2025.

Responsibilities and
basis of report

As the charity's trustees, 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 all 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 in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed:

Date:

29 October 2025

Name:

Clare Chapman

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

Chartered Accountants Ireland

Address:

6 High Street

Bruton

Somerset BA10 0AA

Section B

Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.