

**REPORT OF THE PLANT HERITAGE TRUSTEES  
AND UNAUDITED FINANCIAL STATEMENTS**

For the year ended 31 October 2024

Registered charity no: 1004009/SC041785

Registered company no: 2222953

Contents	Page
Patron, Presidents and Trustees of the Charity*	3
Annual General Meeting 2025*	4
Introduction to Plant Heritage	5
Chairman's Review*	6-7
Plant Heritage's Objectives*	8-9
Activities and Achievements in 2024/25**	10-27
Treasurer's Financial Review*	30-31
Fundraising Activities*	32-34
Structure, Governance and Management*	35-38
Statement of Trustees' Responsibilities	39
Report of the Independent Examiner	40
Statement of Financial Activities	41
Balance Sheet	43
Notes to the Financial Statements	45
*These sections form part of the Trustee's Annual Report	

Patron, Presidents and Trustees of the Charity

<b>Patron</b>	HM The King Charles III
<b>President</b>	Alan Titchmarsh CBE
<b>Vice-Presidents</b>	Christopher Brickell Jamie Compton Lady Hamilton Roy Lancaster Sir Roy Strong Elizabeth Banks David Knott Sarah Bray Michael Marriott
<b>Trustees</b>	Mrs C Bufton (Chairman) Mr J Marshall (Vice Chairman) Mr G Morgan (Treasurer) Ms E Crawforth Dr C Farrer Ms S Flatman Mr J Humphreys Ms J Jahromi Ms K Kapoor Mr D Mathers Sir R Newton Mrs D Weight Mrs S Nex (resigned Dec 2024) Mrs C Penny (resigned Dec 2024)
<b>Charity Number</b>	1004009/SC041785
<b>Company Number</b>	2222953
<b>Independent Examiner</b>	Frances Wilde FCCA DChA Warner Wilde, Chartered Certified Accountants 4 Marigold Drive, Bisley Surrey, GU24 9SF
<b>Plant Heritage Office</b>	First Floor Offices, Stone Pine, Wisley, Woking, Surrey, GU23 6QD

## Annual General Meeting 2025

Plant Heritage is a membership organisation, led by the Board of Directors who are the charity's trustees. All members have been invited to our 2025 Annual General Meeting on 24<sup>th</sup> April to meet the trustees and ask questions on past performance and future plans. This will be a virtual event, so that our members based across the UK can attend.

Questions about anything contained in this report or the accompanying Financial Statements should be addressed to the chair of the board by email: [chairman@plantheritage.org.uk](mailto:chairman@plantheritage.org.uk). If that is not possible, questions can also be sent by mail to the Plant Heritage office address: Plant Heritage, Stone Pine, Wisley, Woking, Surrey, GU23 6QD, or telephone 01483 447540.



## Plant Heritage

Those who founded Plant Heritage more than four decades ago set in motion a movement to protect the diversity of cultivated plants grown across the UK. They recognised that, without this work, we risk losing thousands of unique plant varieties that bring joy and represent an important historical and future resource. Our mission is even more vital as we face up to climate change, the loss of global biodiversity and an increasingly urban society.

With our thousands of members and through our flagship conservation schemes - the National Plant Collections® and Plant Guardians® - we are safeguarding around 95,000 plants for the future, from tiny orchids to enormous oak trees. Anyone who has an interest, passion or expertise in a plant or a group of plants, whether amateur or professional, can get involved. The National Collection holders come from all walks of life and live across the length and breadth of the British Isles. They curate and cultivate their own collection, and this becomes part of the largest living library of garden plants held outside botanical institutions in the UK.

Plant Heritage has a small team of staff, who work with hundreds of volunteers across the country. The members of our Board and committees are also volunteers. Information about the plants in our conservation schemes is stored securely in our award-winning system Persephone. The Threatened Plants Programme underpins our conservation work. It is an ongoing research initiative that identifies cultivated plants that are not widely available commercially, to help inform conservation efforts. As a charity, Plant Heritage is funded through membership subscriptions, donations from individuals (including legacies), companies, charitable trusts and sponsorship, as well as fundraising activities like our volunteer-run Seed Shop. It truly is a team effort, protecting plant diversity for our common good.



From top left clockwise: National Collection Holders David Simpson (*Tradescantia Andersoniana* Group & *Tradescantia virginiana* cultivars), Margaret Stone (*Pulmonaria* cultivars, *Symphotrichum* (*Aster*) *novae-angliae*; and *Geranium sanguineum*, *macrorrhizum* & × *cantabrigiense*); and David Carver (*Hyacinthella*). Picture on right: Plant Heritage CEO Gwen Hines, standing in the National Collection of *Erica* (heathers) at RHS Wisley garden.

## Chairman's Review



2024 started well with the delightful news that Catherine Penny - Collection Holder, Group Chair and one of our long serving Trustees - was awarded an MBE for outstanding services to plant conservation and the community in North Preston, Lancashire. Mid-year, we were delighted to be informed that HM The King chose Plant Heritage as a priority to continue his royal patronage. We feel his support in many ways, not least through his shared passion for plants demonstrated through the National Plant Collections held at Highgrove and Buckingham Palace. Recognition for the value of our work was also reflected in the CBE awarded in the January 2025 New Year's Honours list to our President, Alan Titchmarsh, for services to horticulture and to charity.

This was also the year when we decided we were ready to recruit a CEO, welcoming Gwen Hines to the team in March 2024, who joined us from Save the Children UK. Gwen's passion for horticulture embodies the ethos of everyone at Plant Heritage and the important conservation work we strive to achieve. She has made an exceptionally strong start and has already visited many groups and National Collections. We are looking forward to our next chapter with Gwen at the helm.

Once again, we finished the year with a record number of National Plant Collections (727), including the first ever to be held in a pub and another first in a women's prison. Their accreditation shows that anyone with a passion for plants can take an active role in plant conservation, and that National Plant Collections can be held anywhere. We can be proud that our work at Plant Heritage contributes to the objectives in the Global Biodiversity Framework. This year's winners of the prestigious Brickell Award are a great example of excellence in conservation. The prize went to Gill Mathers, David Mathers and Jim Durrant from the Mathers Foundation, in recognition of their outstanding work conserving a variety of orchid species and hybrids that otherwise might be lost. Two of their National Plant Collections were rescued when the original Collection Holder was no longer able to maintain them. This demonstrates why planning for succession is important, and how it can enable us to keep plants safe and can provide a foundation for further development.

Our brilliant National Collections Holders' conference in November (thanks to Kew Botanic Gardens for hosting us), focused on the importance of succession planning and duplicate National Collections to ensure the amazing work done by Collection Holders is carried forwards. The conference also discussed the importance of shared National Collections held by groups, which enable more people to get involved in our conservation work.

The Plant Guardian scheme continues to flourish with almost 3,000 plants now secured in the scheme. Thanks to funding from the National Heritage Lottery and the hard work of our digital volunteers and staff, it is now possible to find more information about these plants on our website. Both the National Plant Collections and Plant Guardian schemes are underpinned by the work of our Threatened Plants Programme, which identifies plants that are not readily available commercially and deserve special attention to make sure they do not disappear forever.

Plant Heritage members are at the heart of everything we do, evident by the success of the many talks, events and plant fairs organised by our groups and volunteers across the country. Our thanks

## PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2024

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go to the Dumfries and Galloway group who organised a wonderfully informative Members' Weekend in Stranraer in May 2024, hosting the annual Plant Exchange and arranging superb garden visits. We are looking forward to the next get together at Thenford Arboretum in June 2025.

Succession planning is also a topic for our membership team, who are working hard to engage more people with our work. We are delighted that our mission is attracting the interest of a growing number of younger members and students. Their passion for conservation will help sustain and grow our National Plant Collections for the future.

Engaging with the public at plant fairs and shows is one of the best ways to encourage membership and provides people with a first-hand experience of our work. In 2024, we showcased "National Plant Collections everywhere and for everyone," at the Royal Horticultural Society (RHS) Hampton Court Palace Garden Festival. The team were delighted to be awarded an RHS Gold Medal. We also exhibited at many other events across the country, thanks to the hard work of our local groups. We will be returning to the RHS Chelsea Flower Show in 2025 with a Plant Heritage zone.

We are very grateful to all those who fund our work, whether through membership subscriptions, plant sales, events and donations, as well as grants, sponsorship and advertising. Whilst our finances remain strong, with reserves that have enabled us to invest in staff and technology this year, our income is lower than last year, demonstrating how important legacies are to boosting our funds.

For good governance, it is important that we continue to bring a diverse range of expertise to the Board, as trustees may only serve a limited time. This is why seven new trustees joined us in December 2024, along with some new committee members. We would like to welcome everyone who has joined us and record our thanks to two long serving trustees who stood down in December, Sally Nex and Catherine Penny.

In my last year as Chairman, I would like to thank all our members, supporters and volunteers for their time and enthusiasm for cultivated plants. It is through your efforts that we can continue our mission, including the time you give and the funds you help to raise. I would also like to thank those who lead our Local Groups and our Local Representatives who keep the work of the charity alive across the country. I'd also like to say how proud I am to have worked with such an exceptional staff team whose passion for plants shines through in all they do. On behalf of the Board of Trustees, I thank you all.



Cecilia Bufton  
Chairman

April 2025

## Trustees Report – Objectives and Achievements

The Board, who are the Trustees of Plant Heritage (“the Charity”), present their annual report for the year ended 31 October 2024, prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity’s governing document, the small companies regime s419(2) Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) and “Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)”

### Plant Heritage’s charitable purpose:

Plant Heritage’s charitable purpose as set out in our [Articles of Association](#) and Memorandum of Understanding is to:

- Promote the conservation of cultivated plants with a focus on endangered or rare garden plants
- Encourage and carry out research into cultivation of rare or endangered plants and related information
- Encourage the education of the public in horticultural skills, particularly with regards to cultivated plant conservation
- Encourage the introduction and the propagation of rare, cultivated plants not represented in the UK, within the law

We aim to do this by:

- Conserving our horticultural heritage by keeping living examples of plants in the **National Plant Collections**<sup>®</sup> scheme which enables us to coordinate collections, ranging from cultivated and species, to historical, heritage and scientific
- Identifying cultivars at the highest risk of extinction, with the ambition that these can be conserved. We do this through our **Threatened Plants Programme**
- Encouraging individuals to conserve individual plants in the **Plant Guardian**<sup>®</sup> scheme, a register of holders of rare and unusual plants
- Sharing rare plants with gardeners across the UK, through our annual **Plant Exchange**
- Documenting and recording collections of rare plants. This is done by our National Collection Holders and Plant Guardians and in our publications such as the *Directory*, *The Journal*, and through our online plant recording database **Persephone**
- Increasing the variety of garden plants available for gardens in the UK through supporting and undertaking group propagation activities and plant sales
- Ensuring rare plants and collections are supported in perpetuity (for future generations)
- Supporting Plant Guardians and National Collection Holders in their conservation work
- Educating the public in the importance of our work
- Working in partnership with organisations that can support our objectives
- Raising **funds** to support this work



## Our Conservation Strategy

Our conservation work is carried out in line with a five-year strategy (2022-27) that helps us to keep to the highest conservation standards and is delivered by working with National Plant Collection® holders, Plant Guardians, our volunteers, members, partners and supporters.

Our conservation strategy has four objectives:

1. To increase the number of cultivated plants conserved across the UK and Ireland
2. To develop and maintain good standards of curation
3. To inform and engage others with our conservation work
4. To influence global thinking on issues around plant conservation

## Why our work matters more than ever

The UK's cultivated flora is incredibly rich, resulting from our history as well as development and care over centuries by dedicated gardeners and breeders. Nobody knows exactly how many different garden plants there are in the UK. The Royal Horticultural Society (RHS) has estimated that there could be as many as 400,000. Plants are a valuable historical and future resource, whether for their beauty, or having edible, medicinal or other useful properties. Each plant has a unique genetic code making it impossible to replace if lost. Protecting a diverse range of plants is good for biodiversity and increases our resilience to shocks, like extreme weather and pests and diseases.

### Box 1: Increasing Threats to Garden Plant Diversity

#### Changing fashions

Changes in styles of planting and taste mean groups of plants go in and out of fashion, but if they are not being grown, they disappear forever. We want to protect a wide variety of plants, so we can enjoy them today and tomorrow.

#### Pests and diseases

The nature of modern trade and travel has increased the risk of new pests and diseases being imported into the UK. Recent examples include box blight, ash dieback, and agapanthus gall midge. Climate change is making this worse. There is a growing interest in finding plants that are less susceptible, including research involving heritage varieties.

#### Climate Change

Historically, the UK's mild climate has enabled us to grow a huge variety of plants, brought back from elsewhere or bred in the UK. Our changing climate is putting this at risk. Droughts, floods, storms and rapid shifts (e.g. from very hot to very cold periods) are making the work of National Collection holders harder. Yet the genetic diversity contained in these collections is important for our future resilience to climate change, and for global biodiversity.

#### Changes to the plant sales trade

Many garden centre chains and supermarkets stock a very limited range of plants, of a certain size and want to display them to customers when they are in flower. Specialist nurseries carry a much wider range, but it is hard for them to compete. Import/export restrictions designed to control pests and diseases, and post Brexit have made it even harder. We need to celebrate and protect the plants we have and support specialist nurseries.

#### Loss of key skills

A lack of horticultural skills, particularly in plant propagation and cultivation, is causing a reduction in the availability of specialist plants. Through our workshops and talks and working with partners we want to reverse this trend.

Plants growing in gardens might seem safer than those in the wild, but they can easily be lost forever if nobody is looking after them. Plant Heritage is the only organisation with the aim of conserving garden plants across the UK and Ireland. Today, our work is more important than ever, because of the increasing threats we face (see Box 1). We believe that cultivated plants deserve to be conserved. Each one contains a unique combination of genetic material and is testament to human effort and inventiveness.

## Progress towards Objectives in 2023/24

### **Objective 1:           Increasing the number of cultivated plants conserved by Plant Heritage across the UK and Ireland**

#### **National Plant Collections®**

A National Plant Collection is a registered and documented collection of a group of plants. Collection holders are individuals or organisations who undertake to conserve these plants by growing them and recording information about them. Many share plant material with others, and some do research into their plants. Each National Collection has a defined botanical scope either taxonomically, such as all the *Penstemon* cultivars, or by their shared history such as plants collected by Harold Comber. They might otherwise have a geographic link, such as Northwest English apple cultivars.

National Plant Collections are made available for people to view, either by appointment, on special open days or as part of a garden open to the public. Together, they represent a huge resource for gardeners, nursery owners, garden designers, plant breeders and those interested in historical gardens and landscapes. Having these plants part of a registered conservation scheme ensures that they will be a resource for generations to come.

The National Plant Collections scheme is overseen by the Plant Collections Committee, a sub-committee of the Board, whose members are independent advisers, experts in taxonomy, horticulture, botany and the horticultural trade and area group volunteers. The committee rigorously assesses new applications for scope and coverage and also considers guidance for Collection Holders on cross-cutting issues such as plant health.

Today there are National Plant Collections everywhere from windowsills to back gardens, greenhouses, parks, allotments, public gardens, plant nurseries and zoological gardens. In 2024, we were delighted to welcome the first National Plant Collections in a pub and in a prison (see Box 2). Their accreditation shows that anyone with a passion for plants can take an active role in plant conservation.

There are still some important groups of garden plants that are not represented in National Collections. Through our annual Missing Collections campaign, we encourage more people to consider becoming a National Collection Holder (see below).

**Box 2: The first National Plant Collections in a pub and a prison**

The White Hart in Bitton, between Bristol and Bath, has a National Plant Collection of *Crocsmia* with nearly 200 varieties, from rare cultivars such as ‘Zeal Remembrance’ to more common forms found in many gardens. Cared for by the pub’s owners Jemma Wiggins and her husband James Smith, the main Collection is held in the beer garden, in pots and in borders. It is supported by a private courtyard holding more cultivars, and come summer, the beer garden is teeming with yellows, reds, oranges for customers to admire.

HMP Eastwood Park is a prison and young offender institution for women. Their National Plant Collection of *Tulbaghia* is cared for by Gary Stone, HMP Eastwood Park’s Horticultural Craftsman, and two female prisoners. The different species are dotted around the prison garden in pots. The prisoners have learnt how to look after the collection, including repotting, labelling and helping with the paperwork, which develops many different skills. The star-shaped flowers bloom in late summer and into early autumn, and bring a pretty range of whites, pinks and delicate purples into the garden.



*Tulbaghia* ‘Hoyland Giant Beauty’



*Crocsmia* ‘Bressingham Dark Fires’, photo credit Jemma Wiggins

In 2024, we reached a new record of 727 accredited National Plant Collections (715 in 2023), including 40 new collections. Of these, 362 are categorised as horticultural collections, 277 as reference collections and 88 as historical collections. Sometimes people come forward with a collection that is already well developed and sometimes it takes longer. Of the 54 new proposed National Collections in 2024 (45 in 2023), 15 came forward for full accreditation within the year. There are over 100 proposed National Collections outstanding, many of which will become fully accredited in future.

In total, 17 National Plant Collections were withdrawn this year, for a mixture of reasons. Sometimes plants suffer badly from pests and diseases and cannot be saved. Sometimes Collection Holders need or want to step back from this work, which is done on a voluntary basis. In several cases this year, the rare or unusual plants from a withdrawn National Collection were transferred to the Plant Guardian scheme, which helps to keep them safe. We ask all National Collection Holders to develop a succession plan, and we are encouraging more duplicate Collections which help to spread the risk. Garden Organic's new National Plant Collection of species *Calendula* is a good example of continuity: it was previously at Bristol Zoo (a zoological garden, which closed in 2022) and we are very grateful to the garden team there for their dedicated work to record and preserve the seed of the collection until a new home could be found.

The new National Collections of *Agave*, *Hamamelis* and *Amelanchier* accredited in 2024 are duplicating older collections, which is important to help ensure their long-term future. It is also encouraging to see more shared (dispersed) Collections come forward: these are held by groups, which is a great way for more people to get involved in plant conservation.

### National Collection Holders' Conference 2024

The 2024 Conference held in November focused on how we can ensure the continuity of National Plant Collections in this era of environmental change. It was well attended, with 130 participants including two Plant Heritage Vice Presidents: Sarah Bray and Michael Marriott. Kew Royal Botanic Gardens (which has 10 National Collections across the Kew and Wakehurst site) kindly hosted the event. We had keynote presentations from Simon Toomer, Kew Curator of Living Collections, Lucy Hart, Head Gardener at Fulham Palace House and Garden and James Armitage, Editor of the RHS Plant Review. We also had short talks from several National Collection holders: Catrina Fenton from Garden Organic on 'Calendula: a diverse and exciting venture for seed conservation'; Chris Bird and Liz Smith of Sparsholt College on 'DNA the Apple Way'; and Bethan Collerton from Birmingham Botanical Gardens, 'Caring for Cyclamen in a Changing Climate'. We finished with an engaging panel discussion.



Participants at the National Collection Holders' Conference 2024, held at Kew Royal Botanic Gardens

### Threatened Plants Programme

Through our Threatened Plants Programme (TPP), Plant Heritage conservation staff track the history, availability and locations of cultivated garden plants to work out how rare or threatened they are. This information can be used to help prioritise plant conservation work. Threatened plants may be Critical in cultivation (not found alive), Endangered in cultivation (grown in only one or two locations), or Vulnerable in cultivation (three or more sites).



Assessments are reported as data or in written reports, internally and for partners such as National Collection Holders, the RHS and specialist societies, to promote and support active conservation of threatened and near-threatened garden cultivars. Plant Guardians can also see if a plant has been assessed as threatened by looking at the digital plant records in our Persephone system.

The Threatened Plants Programme holds information, for the UK and Ireland specifically, on nearly 133,000 different named cultivars in 1,624 genera. Of these, over 7,000 are additional to the RHS 'Find a Plant' online database, which is the most widely used public source of cultivated plant information in the UK.

We hold important and fascinating information about these plants, including trade names, synonyms, Plant Breeders' Rights (PBR), awards, first and last dates listed in the RHS Plant Finder (1987-2024), first and last dates grown (1562-2024), whether they have been part of a National Plant Collection (past, present and proposed) or the Plant Guardian scheme, or recorded in our annual Plant Exchanges, Threatened Plant of the Year competition, or registered at botanic and historic gardens. We also hold information from International Cultivar Registration Authorities, referees, archived files and online sources. Conservation status is calculated by Plant Heritage within the programme. Of the nearly 133,000 plants assessed under the Threatened Plants Programme by the end of this year, 75,050 plants were assessed as threatened, which shows how many of our amazing garden plants are not readily available commercially and could be at risk of disappearing. The National Plant Collections are an important way to protect these plants: in our sample analysis of 23,230 different cultivars held in 326 National Collections, 7,967 meet the threshold for being categorised as 'threatened'.

### **Plant Guardians®**

Plant Heritage encourages our members to take an active part in conservation work by becoming a Plant Guardian. They can look after one or more rare or unusual plants, without looking after a whole National Plant Collection. Sometimes people already have a special plant, and we can check if it is rare or unusual. In other cases, people take on a plant that's eligible for the Plant Guardian scheme through our annual Plant Exchange for members.

Plant Heritage keeps a digital record of plants in the scheme (in Persephone). We encourage Plant Guardians to propagate the plants they are caring for and to share them with other members via the Plant Exchange, local Plant Heritage propagation groups or via plant sales. Through the scheme, rare plants are grown in multiple locations as an insurance against loss.

The scheme has gone from strength to strength since it was first launched in 2013. There are currently 2,674 Plant Guardian plants recorded (2,293 in 2023). Of these, 696 cultivars are assessed as 'threatened in cultivation' by our Threatened Plants Programme and 817 are species plants that are rare & hard to locate.

## PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2024

During the year, we published four rare plant blogs, to showcase the scheme and to tell the stories of the plants and the people behind them. These stories are also pushed out via our social media.

We have continued to expand the online catalogue of plants held in the Plant Guardian scheme on our website, developed with funding from the National Heritage Lottery Fund in 2022-



Plant Guardian plants looked after by member Claire Davitt

23 and with the support of our digital volunteers. This catalogue, which is powered by our plant recording system Persephone, has a short description and an image of each plant, plus an assessment of whether the plant is 'threatened in cultivation'. Putting this information together takes time given that these plants are not widely available commercially. Over 500 Plant Guardian plants had been published in the virtual catalogue by November 2024 and our aim is to expand this to cover all plants in the scheme, so they can become better known and enjoyed.

### Plant Exchange

The best way to conserve rare plants is to propagate and share them. Through our annual Plant Exchange, Plant Heritage members propagate and share hard to find plants with other members. By distributing plants around the country, we can re-establish plants in danger of being lost and give members the chance to get hold of something special. We encourage members who receive plants from the Plant Exchange to propagate them and pass them on again, to help secure their future. We also encourage registration of these plants in our Plant Guardian scheme so we can keep track of them. The Plant Exchange for 2024 was held in Stranraer, Scotland, at the Members' weekend hosted by the Plant Heritage Dumfries & Galloway Group. 15 groups took part, with around 500 plants being swapped. These plants are recorded in our digital system Persephone. In 2025, the Plant Exchange will be held as part of the annual Plant Heritage members' day at Thenford Gardens and Arboretum near Banbury, Oxfordshire.



Members swapping plants at the 2024 Plant Exchange in Stranraer, Scotland

**Objective 2:        Developing and maintaining good standards of curation for all plants held in our conservation schemes.**

***National Plant Collection Coordinators***

Collection Coordinators play a vital role in our conservation work: mentoring and advising people who are interested in starting a National Plant Collection, supporting new applicants, visiting existing collections, and acting as the local point of contact for queries. They also act as the link between Collection Holders in their area, the local group and the central conservation team. They are all volunteers, who generously donate their time and skills. In 2024, we were delighted to welcome new coordinators in Southwest Devon and Cornwall. We still have gaps in Herefordshire, East Midlands (covering Northamptonshire & Nottinghamshire), North Staffordshire, Hertfordshire & Bedfordshire, and the West Midlands.

Collection Coordinators are in touch regularly with each other and with the conservation team to report on progress. Collection Coordinators from the south and west of the UK were kindly hosted by the Newt in Somerset, who have two National Collections of apples and crabapples. Coordinators from the Northern region (including Scotland, Ireland and North England) held their annual meeting online. In 2025, we plan to hold a national symposium for all Collection Coordinators to discuss challenges and opportunities for the future and provide some training.

***Financial Support to National Collection Holders***

The Collection Holder Bursary provides funds (£100 - £500) to help to promote, support and improve the National Plant Collections. In 2024, bursaries were provided for interpretation panels and signage at Yorkshire Arboretum, Glasgow Botanic Gardens, Wiltshire College at Lackham and

Garden Organic, so visitors learn more about the National Plant Collections. Six additional bursaries were provided to cover a range of important investments, which would not have been possible without this funding, including a study visit, propagation materials and help with labelling and signs for educational events. In addition to this central fund, several Plant Heritage groups provided direct grants to support National Collection Holders in their area.

### ***Plant Records***

Plant records are an important element of maintaining good standards of curation.

National Collection Holders can choose to keep their plant records in their own system, or opt for Persephone, the award-winning online records system developed especially for Plant Heritage. The central team uses Persephone, and we continue to work towards a fully comprehensive, searchable and accessible database of all the plants in the National Collections.



Persephone now holds records for two-thirds of accredited Collections (487 National Plant Collections in November 2024) as well as 100 proposed Collections. We are adding all new National Collections, as well as plants in the Plant Guardian scheme and plants swapped

through the annual Plant Exchange. Most of the Collections recorded on Persephone are held by private Collection Holders who have added a wealth of information to the site. Where National Collections are held in institutions that use other horticultural databases, they are asked to send a regular output of key data. These records are then managed, on their behalf, by Plant Heritage.

Persephone is owned by Plant Heritage, and we have continued to develop it to meet our needs. In 2024 we invested in a new herbarium module, so users can record information about their physical specimens. The Persephone project is overseen by the Persephone Working Group and delivered by a team of volunteers and staff working together. During the year, the Persephone team responded to many user support requests via email and provided 120 one to one training sessions (online), plus 18 workshops for groups online and one face to face.

Key information about plants recorded in Persephone is shared with the Plant Heritage conservation team and National Collection Coordinators to facilitate management of the scheme. Users may also grant viewing access or various levels of edit access to plant enthusiasts around the world, enabling global exchange of information. The Persephone Team also supports best practice in plant curation by advising National Collection Holders on accessioning and labelling plants. Persephone is also used to manage the records of 'Desiderata' (hard-to-find plants that Collection Holders are seeking). Persephone users may record information about such plants on the site, and this information is visible to all Persephone Users, who may be able to help with finding them.

### **Persephone for Subscribers**

We make Persephone available to large/open gardens to record the plants in their gardens. The scheme has attracted a growing number of subscribers, some in very well-known open gardens & arboreta around the UK. More than 25,000 accessions have been recorded by one garden alone. Use of Persephone by external organisations brings a sustainable



income to the project and extends Plant Heritage’s conservation reach by helping other organisations to record their plants well, including many rare plants.

### **Persephone for Members**

Persephone is also available to Plant Heritage members who can record up to 1,000 plants in their private gardens by taking out our ‘Membership Plus’ subscription. Members with particular plant interests may use Persephone to share their records with each other, so facilitating exchange of horticultural information. Most current member users have indicated that they will be willing to share their records to support plant conservation projects.

### **Objective 3: Informing and engaging others with our conservation work**

By telling others what we do and why, and showcasing the plants in our flagship schemes, we increase public support for plant conservation and for our work.

### **Directory of National Plant Collections**

Any member of the public can easily access information about the National Plant Collections from our website. We regularly update this. In addition, our published Directory lists all National Plant Collections. In 2024 we published a supplementary Directory, giving full details of new Collections accredited in the previous 12 months. This is issued free to members and available to purchase for a small fee if members of the public would prefer to use that instead of our website.

### **Green Plaque Scheme**

National Plant Collections are accessible to visitors whether by appointment, through specific open days, or business open days. We are grateful to all our Collection Holders for their continued commitment to make this possible. We encourage our members and the public to visit the Collections to see for themselves the conservation efforts being made and to enjoy the wide range of plants being conserved. Details of open days are updated regularly on our website.



A growing number of National Collection Holders now display our distinctive Plant Heritage green plaques, highlighting that a National Plant Collection is held in their garden.

National Plant Collection Holders from Norfolk with their green plaques

## The Journal

Our Plant Heritage Journal highlights the conservation work of National Collection Holders and Plant Guardians and is widely respected for the quality of its articles. This twice-yearly publication is edited by Plant Heritage member and former journalist Clare Hogan, who also worked at the Animal and Plant Health Agency (APHA). It is provided free to all members. The aim is to educate and inform people, and to encourage them to take part in conservation by becoming a Plant Guardian or a National Collection Holder, or to get involved with our Plant Exchange. The Spring 2024 edition focused on National Plant Collections that are at their best in midwinter and early spring. The Autumn edition highlighted National Collection Holders who create new varieties, as well as new plants to hold in a Collection. The Spring 2025 Journal is all about planning ahead to ensure the continuity of National Plant Collections. The Autumn 2025 edition will focus on Collections well-suited to cut flowers, given the growing interest in sustainable flower farming.

## Missing Collections Campaign

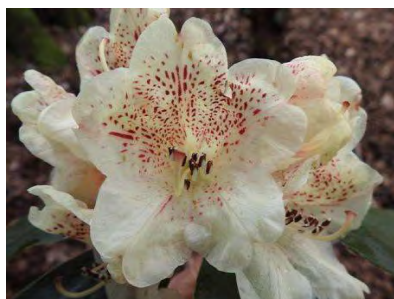
The Missing Collections campaign, first launched in 2016, encourages people with a passion for plants to bring together a National Plant Collection of their own and join the Plant Heritage community in growing, sharing and saving plants. In recent years, the Missing Collections campaign has helped us to secure new collections for *Aeonium*, *Alcea*, *Baptisia*, *Colocasia*, *Eryngium*, *Ginkgo*, *Thalictrum*, *Tradescantia* and *Verbena*. As part of our commitment to environmental sustainability, our 2024 campaign highlighted pollinator-friendly plant groups: *Agastache*, *Argyranthemum*, *Baptisia*, *Caryopteris*, *Clethra*, *Coreopsis*, *Gaillardia*, *Ligularia*, *Lysimachia*, *Origanum*, *Osteospermum*, *Phlomis*, *Potentilla* and *Verbascum*.

We have already received National Collection proposals for three plant groups from our campaign: *Baptisia* (already awarded), *Coreopsis* and two for *Origanum*, which is encouraging.

To publicise the campaign, we gave interviews on numerous local radio stations, contributed to articles in magazines and used our social media and website. We also highlighted the campaign in our display at the RHS Hampton Court Palace Garden Festival. We planted up a border with plants that are safely in National Collections, contrasting this with another border showing examples of stunning flowers from our Missing Collections campaign. This proved to be a good way to explain our work to the public.

## Threatened Plant of the Year

Our annual Threatened Plant of the Year competition draws public attention to this important issue, by giving anyone the chance to enter an unusual, rare or special cultivated plant that is not currently available commercially and has been grown or sold in the UK or Ireland prior to 2014. It continues to attract significant media attention as well as public entries. 12 plants were shortlisted in 2024 and showcased as part of our educational display at the RHS Hampton Court Palace Garden Festival in July.



*Aubrieta 'Shangarry'* (top) and *Rhododendron 'Leonardslee Primrose'*

The judges' 2024 winner of the Threatened Plant of the Year competition was *Aubrieta 'Shangarry'* which is a fitting tribute to the late E. Charles Nelson, who dedicated significant effort to researching and documenting its history. E. Charles Nelson, a respected botanist and author, passed away in June 2024 while on holiday in Greece, but his legacy continues through his extensive writings and the plants he introduced to a broader audience. *Aubrieta 'Shangarry'* was first listed in 1935 and probably named after Shanagarry in County Cork, Ireland.

The 2024 People's Choice award, as nominated by visitors to the show and online via our website, went to *Rhododendron 'Leonardslee Primrose'*, which was raised at Leonardslee Lakes and Gardens in Sussex by Sir Edmund Loder from a cross between *Rhododendron campylocarpum* and a white flowered form of *Rhododendron arboreum*. This is now classed as an endangered cultivar, rarely if ever found in cultivation outside of Leonardslee.

## Brickell Award

The Brickell Award recognises excellence in cultivated plant conservation and has been awarded to a different National Plant Collection Holder every year since 2003. Named after Plant Heritage's founding member and current Vice-President Chris Brickell, it also celebrates the extensive and ongoing commitment, passion and research of National Plant Collection Holders.



Garden historian and writer Advolly Richmond presented the Brickell Award to Jim Durrant, Gill Mathers and David Mathers of the Mathers Foundation

The 2024 Brickell Award was given to the Mathers Foundation in West Sussex, who care for five National Plant Collections of orchids (*Masdevallia*, *Oncidium*, *Pleione*, *Stanhopea* and *Acineta* and *Anguloa* species and hybrids). The judges commended the Foundation for using the 17,000 plants within their care to support research, including tracking, identification and photographic logging of all their plants and studying improved methods of growing and propagation.

**Objective 4: Influencing global thinking on issues around plant conservation and aligning Plant Heritage with global thinking on sustainability, biodiversity, conservation and plant taxonomy**

Plant Heritage's work contributes to the global biodiversity target for 2030, as set out in the Kunming-Montreal 2022 agreement: *'To maintain and restore the genetic diversity within and between populations of native, wild and domesticated species to maintain their adaptive potential, including through in situ and ex situ conservation.'*



**THE BIODIVERSITY PLAN**  
For Life on Earth

The National Plant Collections are an example of *ex situ* (off site) conservation of domesticated species (cultivated plants), although some Collections also include species. Around 33,000 of the plants held in the National Plant Collections originated in the wild and some are now critically endangered in their natural habitats due to climate change and habitat destruction. Having cultivated plants as part of a registered conservation scheme ensures that they will be a resource for generations to come

### ***Sharing knowledge***

Collections can be useful for scientific research as a source of live plants and genetic material for specific investigations. Many of our National Collection Holders have become experts in their field and many share their expertise with others, including through the RHS Expert Groups.

19 of the National Plant Collections now hold scientific status, which means that the Collection Holder can demonstrate active involvement in maintaining and enhancing the taxonomic status of their plant group, in cooperation with other collections and authorities, as well as a sound knowledge of other collections (held nationally and internationally) in their genus or group and regular communication with them. They must also be able to demonstrate how they have shared their knowledge and plant material for the good of conservation and the genus concerned, including through publication. In 2024, two Collection Holders applied to work towards scientific status. Those applying for scientific status are matched with a mentor to support them through this process.

Building on our discussions with the French National Collections scheme (the Conservatoire des Collections Végétales Spécialisées or CCVS) during 2023, we have joined over 600 others in endorsing their [Manifesto on the Protection of Living Plants](#).

We continue to participate in the UK Plant Genetic Resource (UKPGR) group which serves as the technical forum to discuss plant genetic resources issues, technical matters, the development of integrated programmes and provide policy advice for government departments. The primary concern for UKPGR is food production and we have facilitated the addition of data from apple collections to be listed in the European inventory of plant genetic resources (EURISCO), which aims to make the European plant genetic resources data available everywhere in the world.



### ***Embedding sustainability***

Recognising the growing threat from climate change, we have stepped up our focus on environmental sustainability. This was a key theme at the 2024 National Collection Holders' Conference. We also organised a range of talks and workshops for Collection Holders and other members to share best practice and consider the latest research.

Some of National Collection Holders and members have been leading the way on environmentally sustainable practices for decades. We want to learn from them. We have also shared guidance with our members about plant health, plant passports and the need to tackle the rise in plant poaching, in line with the global Convention on International Trade in Endangered Species (CITES). Through our members and network of partners, we can draw on material from organisations like DEFRA's Animal and Plant Health Agency (APHA), Botanic Gardens Conservation International (BGCI) and Kew Royal Botanic Gardens.



Members visiting Melcourt Industries

Melcourt Industries kindly hosted Plant Heritage members at their production site in Gloucestershire in February 2024 to learn about their peat free growing media and the Responsible Sourcing Scheme.

Plants play an important role in mitigating, adapting to, and building resilience to climate change. By making sure plants don't disappear and encouraging people to grow a diverse range of plants, we are making a positive contribution to environmental

sustainability, but we also want to ensure that we are minimising our waste, reducing our carbon emissions, and encouraging more of our members to adopt sustainable growing practices. We have published a statement about our commitment to embedding sustainability on our website, to go with our statement on peat in horticulture.

### ***Workshops***

During the year, we held several workshops for National Plant Collection Holders and other Plant Heritage members on topics related to plant conservation, including the following:

- Online workshop about the Plant Guardians scheme and research- provided by our conservation team
- Peat free growing – an online discussion about emerging results from the RHS Peat Free research fellowship, as well as the visit for Plant Heritage members to Melcourt Industries' production facility
- Seed Collecting Workshop - hosted by the seed team at RHS Wisley Garden

## PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2024

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- Garden Plant Taxonomy (at the Plant Heritage Members' Weekend in Stranraer)
- Communicating through Social Media (at the Plant Heritage Members' Weekend)

These workshops are in addition to training people to record plants in Persephone.

These workshops were provided either free or at a low cost, thanks to financial support from trusts and foundations, and/or the support of our partner organisations.



Members taking part in the seed collecting workshop hosted by RHS Wisley Garden seed team

### ***Collaborating with Colleagues***

From its founding in the 1970s, Plant Heritage has worked in partnership with world leading organisations including the RHS, the National Trust, the National Trust for Scotland and the Royal Botanic Gardens at Kew and Edinburgh. These organisations are all members of Plant Heritage, many provide experts for our committees, and they host some of the larger or more complex National Collections.

The National Collections and the importance of plant records are taught to horticultural students as part of the syllabus for several courses, and students get involved in practical conservation too. We were delighted to welcome students from Logan Botanic Gardens at our Members' Weekend in Stranraer, and Kew students at the National Collection Holders' conference.



Threave School of Heritage Gardening, owned by the National Trust for Scotland, has a National Collection of Iris Siberian cultivars (British Award winners & historically significant)

We are working with other members of the Future of Gardens Group, established by the President and CEO of the RHS in 2023 to develop action plans for joint work in four areas where collective action could make a difference to the future of horticulture and the role of national gardens:

1. The role of gardens in tackling sustainability, climate and biodiversity crisis
2. The lack of people who opt to train in horticulture and its link to the wider green skills agenda in the UK
3. Raising the national profile of the importance of UK national gardens for tourism and the economy
4. Engagement with Government

A [new report](#) by the Environmental Horticulture Group highlights the importance of horticulture for the UK economy and for tackling climate change. Plant Heritage joined others to help launch this report at the All-Party Parliamentary Group for Horticulture and Gardens' Parliamentary reception in January 2025.

## Related Parties

Two affiliated groups (the Manx Plant and Garden Conservation Society in the Isle of Man and Plant Heritage Guernsey) share the same objectives as Plant Heritage and generously support our work. Plant Heritage Guernsey's National Collection of Nerines has its roots in the very early days of the Guernsey Branch of the National Council for the Conservation of Plants and Gardens (Plant Heritage's former name), when it was decided to establish a living collection of the island's national flower. Plant Heritage also has links with the Wiltshire Gardens Trust who support our work, and the Irish Garden Plants Society (IGPS). The IGPS have a National Collection, accredited in 2021, of plants with an Irish connection, either bred or discovered in Ireland, introduced by an Irish person, or linked to an Irish garden or gardener. This shared Collection is held in the gardens of around 75 their members as well as several public gardens across Ireland.

## Membership

Members are a vital part of Plant Heritage. All members support our conservation work through their paid subscriptions, and many are directly involved in plant conservation as National Collection Holders, Plant Guardians or take part in our annual Plant Exchange or local plant fairs. We thank all



our members for their ongoing support.

As of November 2024, our total membership was 3,120. Whilst this represents a slight reduction (3,205 in 2023), we have reduced the rate of decline to 2.7% (4.5% in 2023), in line with our objective to stabilise, then re-grow our membership. We are continuing to increase the number of younger members and students (up 58% compared to 2023). We held a series of online discussion groups during 2024 for younger members and increased the age cut off from 30 to 35 in response to their feedback. The number of new members recruited (321) increased by 27% compared to last year, whilst the number leaving stayed broadly the same. It is therefore important that we focus both on recruitment and retention. We have restarted a programme of online talks and workshops, which proved popular during the pandemic and is especially important for members living in areas where there are not active local groups. All members can attend events in any region, not just those organised by their local group. All members receive a copy of our twice-yearly Journal, the Directory of National Plant Collections and email newsletters about our conservation work and member events.

### Local groups

Plant Heritage members are encouraged to participate in the activities of their local Group, of which there are 25 across the UK. The volunteer committees of the groups put in a tremendous amount of effort to organise a programme of talks (some as hybrid events), plant fairs, visits and open days for their members, which also raise funds for the charity.



Some of the many activities organised by Plant Heritage local groups

We are very grateful to the Dumfries and Galloway group who organised a fantastic Members' Weekend in May 2024 in Stranraer, Scotland. Members enjoyed our annual Plant Exchange, educational workshops, fantastic food and engaging talks by Colin Crosbie, former Head Gardener to Her Majesty Queen Elizabeth, the Queen Mother at Royal Lodge Windsor and former Curator at



## PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2024

RHS Garden Wisley, as well as Richard Baines, Curator of Logan Botanic Garden. Richard Baines also led us on a tour of Logan Botanic Garden, which holds four National Plant Collections.

The 2025 Member Day and Plant Exchange will take place on 7<sup>th</sup> June at Thenford Gardens and Arboretum near Banbury, Oxfordshire which has a National Plant Collection of *Galanthus* (snowdrops) as well as many other informal collections of plants and trees.



Members' Weekend 2024, kindly hosted by the Dumfries and Galloway Group

## Volunteers

Whether at local or national level, volunteers are at the heart of our work. From organising or contributing to local group activities, to propagating plants for plant fairs, coordinating local National Collections or the Plant Exchange, helping people to record plants on Persephone, and a whole range of tasks volunteers help us with in the central office. The support our volunteers so generously give and the knowledge and skills they share are sincerely appreciated.



Julia Cogan and June James with the Plant Heritage seed shop at RHS Hampton Court Palace Garden Festival

Plant Heritage's volunteer-run Seed Shop was a great success in 2024 raising nearly £9,000 from donations, and encouraging more people to grow plants from seed, or to try growing a new plant. Plant Heritage members generously donated nearly 6,000 packets of seed, sorted and labelled by our keen volunteers.

## Events and Shows

### *RHS Hampton Court Palace Garden Festival, July*

Our theme for the Plant Heritage zone 2024 was 'National Plant Collections everywhere and for everyone'. We made a point of showing that plants in National Plant Collections can be incorporated into borders with other flowers for those short on space and highlighting that there are also National Plant Collections of houseplants.

We planted two borders: one with plants safely in National Plant Collections and another showcasing pollinator friendly plants from our Missing Collections campaign. We also featured the Threatened Plant of the Year competition and the Plant Heritage Seed Shop. The display successfully highlighted our work in plant conservation to the public and attracted new members. It was also awarded a gold medal by the RHS.



Hampton Court Palace Garden Festival display, 2024

Daniel Myhill won the award for best Plant Heritage exhibit for his National Collection of *Rosa persica*. The Plant Heritage zone also included displays of *Rubus* from Barry Clarke, *Pinus* from Sir Harold Hillier Gardens and *Hosta* (small and miniature) from Hogarth Hostas. Several nurseries also showcased their National Plant Collections on their own stands, including Tynings Plants who have four National Collections of climbing plants (*Passiflora*, *Jasminium*, *Mandevilla* and *Thunbergia*) and were chosen as the RHS Master Grower.

Thank you to all the Collection Holders who took part, to everyone who helped with our display during the build and during the week, and to those who donated plants and seeds. We also thank the RHS for their support at these shows.



## PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2024



Photos from Hampton Court Palace Garden Festival 2024

### ***Regional shows and local plant fairs***

For the first time, we mounted a Plant Heritage display at the Royal Windsor Flower Show in June and we returned to the Malvern Autumn Show in September. We also took part in the RHS Wisley event for young people in August 2024, and the Wisley Festival of Flavours in October.



Plant Heritage President Alan Titchmarsh and HRH The Duchess of Wessex visited the Plant Heritage Windsor stand and were welcomed by Helen Moorcraft (Chair of the Buckinghamshire, Berkshire and Oxfordshire group) and Gill Groombridge (Plant Heritage Business Manager) - see photo.

This is in addition to the many specialist plant fairs and displays organised by Plant Heritage groups and National Collection Holders across the country, which help to build public understanding of our work, encourage more people to grow unusual plants and raise funds. Large plant fairs were held at several venues including Helmingham Hall (Suffolk), Longstock Nurseries (Hampshire), Abbotsbury Gardens (Dorset), RHS Bridgewater (Northwest Group), Markshall Estate (Essex Group) and RHS Rosemoor (Devon Group). We thank all the local Groups and volunteers involved in these events.

## PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2024



Some of the many local group plant fairs, held across the country

### Show plans for 2025

We are returning to the RHS Chelsea Flower Show in May, in addition to the RHS Hampton Court Palace Garden Festival in July. In both cases, we will have a Plant Heritage zone, so that we can showcase the work of National Collection Holders alongside a central display explaining the charity's work and why it is important. The Plant Heritage Yorkshire Group will be taking part in the new RHS flower show at Wentworth Woodhouse in July.

### Website and IT

Plant Heritage's website ([www.plantheritage.org.uk](http://www.plantheritage.org.uk)) is a key tool for us to share information about our work. One of the most popular parts of our website is the National Plant Collections search facility. We will be refreshing the resources for National Collection Holders on our website during 2025. People also use the website to join or renew their membership and to search for information about local groups and upcoming events. Some people will always prefer to contact us by phone or email, and we will continue to offer this option. We are updating our website in early 2025 as well as a new Customer Relationship Management system. This will save considerable staff time. We purchased several laptops this year to replace old/broken ones.

### Media and Public Relations

Across all media, we are making progress against our objective to raise the profile of Plant Heritage, using stories about plants and people behind the plants.

Our social media presence continues to grow, especially through Instagram (over 6,000 followers)



and Facebook (6,700 followers).

In terms of external media, in the 12 months to 31 October 2024 we generated a new record of 253 items of coverage\* compared to 158 items in the previous 12 months, as follows:

- 33 broadcast interviews (same as previous year) including radio and TV programmes
- One national newspaper article (Daily Mail) (3 in 2023, none the previous 2 years)
- 25 regional newspaper articles (5 in 2023)
- 45 magazine articles or features (27 in 2023)
- 149 online articles or features (90 in 2023)

The estimated potential audience reach is 508 million. This is obviously a big number and shows how much getting into national newspapers can increase our reach. Of course, we cannot guarantee that every reader and/or listener will have seen the article or listened to the radio at the exact time Plant Heritage was on – so this is just a guide and a standard reporting measure used by many organisations. The largest growth has been online articles and features. Our Threatened Plant of the Year competition and the Missing Collections campaign continued to generate significant media interest, including interviews on local radio gardening programmes by Gill Groombridge and Gwen Hines and the RHS gardening podcast. The new National Collections in a pub and a prison also attracted lots of attention.

## Treasurer's Financial Review<sup>1</sup>

This has been another successful year for Plant Heritage. The level of reserves established in previous years has allowed us to move ahead with plans for the future. Overall income was £405,188 (£639,115 in 2023) and expenditure was £461,922 (£452,244 in 2023). The difference (£56,734) was met by drawing down on the charity's reserves, as planned.

### ***Incoming resources***

Total income from legacies and donations in 2024 was £101,039 (2023: £349,050). The previous year was unusual, due to exceptionally large legacies (£250,581) and the National Heritage Lottery Fund Grant (£42,138) which has now finished. In 2024, we achieved an increase in funds secured from trusts and foundations (£42,753), including £11,293 raised through our first public fundraising campaign with the Big Give Green Match Fund (who provided £5,000 of this as match funding). Without these funds, we would have had to scale back our conservation activities. Income from charitable and trading activities (including shows and events) held up well at £274,413 (2023: £277,222). Income from investments increased significantly to £29,736 in 2024 (£12,843 in 2023).

### ***Resources expended***

Plant Heritage spent a total of £461,922 (2023: £452,244) on Charitable Activities, Fundraising and Governance in 2023. Charitable expenditure, including on plant conservation was £454,556 (2023: £449,050). The cost of generating funds was £7,366 (£3,194 in 2023).

### ***Intangible fixed assets***

Intangible fixed assets include the cost of website development work as well as the costs of development of Persephone 2.0. The total value of intangible fixed assets at the end of the year was £65,800 (2023: £79,610). The Trustees regularly review the value of intangible fixed assets as well as other fixed assets to the business.

### ***Reserves policy***

As a small charity, Plant Heritage's income and expenditure can vary significantly year to year, due to fluctuations in legacy donations and resources raised from trusts/foundations and grants.

In previous years, it has been the policy of the charity that unrestricted free funds which have not been designated for a specific use should be maintained at a level equivalent to six months' operating costs, including salaries. In addition, a further £60,000 of reserves were designated for a specific Risk Reserve, to provide a cushion against possible future sudden changes in the charity's operating environment like that presented by the COVID-19 pandemic.

Following a review, the Trustees have decided to adjust the charity's policy on reserves, to remove the separate Risk Reserve and instead to maintain unrestricted free funds at a level equivalent to nine months' general operating costs, including salaries. This will be kept under review. The Trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to

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<sup>1</sup> Plant Heritage's financial year runs from 1 November to 31 October. This review covers the financial year 2023/24 which ended on 31 October 2024 and is referred to as 2024 above.

ways in which additional funds may be raised. This level of reserves has been maintained throughout the year. The charity's budget for 2024/25 forecasts operating costs of £340,000, therefore our minimum target for unrestricted free funds is £255,000.

As of 31 October 2024, the charity had £582,266 in the general fund (2023: £591,783). Deducting the net book value of intangible and tangible fixed assets (£69,597), the level of free reserves in the general fund is £512,669. Whilst our actual free reserves are currently above target, these will reduce significantly over the next 2-3 years as we draw down on them to fund our strategic plans. At the same time, as the charity's work expands, the target for reserves will increase. We envisage that, within 24 months, our actual free reserves will be closer to our new target level. 2024 demonstrates the uncertainty of legacy funding, in particular. Therefore, the trustees feel that maintaining a level of reserves higher than target in the short-term provides additional financial security as the charity grows and develops.

As of 31 October 2024, there were a further £189,430 of reserves designated towards specific purposes. This includes £50,000 for planned investments in our IT infrastructure, including the new Customer Relationship Management (CRM) system, upgrades to our website, further development of our plant recording system Persephone and replacement of equipment nearing its end of life.

***Going Concern***

Whilst we recorded a deficit in 2024 of £56,734, this was expected as we begin a growth strategy and invest in the charity's business. Given this, we consider our operations to be sustainable in the short, medium and long-term and that there is an optimistic outlook with no material uncertainty. Whilst some of our key income streams, particularly legacy income, can be volatile, Plant Heritage has accumulated a level of reserves to be able to respond to a sudden downturn in revenue, and to recruit a CEO as part of plans to further diversify and build future revenue.

The Charity has a healthy reserves position and has met its free reserves target and has also put aside designated funds. The Charity also carefully manages its working capital position and maintains a healthy cash position.

## **Fundraising Activities**

### **Donations and Sponsorships**

Plant Heritage is indebted to its supporters, sponsors, and advertisers – we thank them all for their generous support and in particular:

Griffin Glasshouses  
Johnsons Seeds  
Melcourt Industries Ltd

Plant Heritage gratefully acknowledges grants and donations from the following charitable trusts and foundations, which help to support our core conservation work as well as the Threatened Plants Programme, National Collection Holder and membership workshops, the Plant Guardians scheme and our Persephone development work:

The Swire Charitable Trust  
The Hawthorne Charitable Trust  
The Goulburn Charitable Trust  
Mrs AA Clutterbuck Charitable Trust  
Alfred Williams Charitable Trust  
RHS Bursaries Fund  
William Dean Countryside and Educational Trust  
Jack Patston Charitable Trust  
The Simon Gibson Charitable Trust  
The Big Give Green Match Fund  
P F Charitable Trust  
Hamamelis Trust  
The Frogna Trust

Plant Heritage also acknowledges donations from National Collection Holder open days, whether individual open days or through the National Garden Scheme or Scotland's Garden Scheme, all individual donations from Members, Friends and supporters.

### **Income from legacies and in memoriam**

We received income from legacies from Mary Rawitzer, Gerald William Goddard & Rosemary Francis this year. We are also grateful to The Harkness Rose Company for their support from the 'Rosemary Day' rose in memory of Rosemary Day, former Trustee of Plant Heritage. We wish to thank those that gave donations in memoriam too.

### **Corporate Members**

We are grateful for the continued support of our Gold Corporate Members in 2024:



## PLANT HERITAGE

Annual Report and Financial Statements for the year ended 31 October 2024

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Barton Grange Garden Centre  
Shanly Homes

We are also grateful for the continued support of our Bronze Corporate supporters:

Arboricultural Association  
Bayntun Flowers  
Brother UK  
Canonteign Falls  
Capital Gardens Ltd  
Doddington Place Gardens  
Floral Tours  
Griffin Glasshouses  
Johnsons Seeds  
Melcourt Industries Ltd  
Wacks Wicked Plants  
Whatley Manor  
Winterling – Botanical Labels  
Woottens of Wenhaston

## **Transfers from Groups**

We are very grateful for the generosity and creativity of our Plant Heritage groups who continue to be focused on engaging with Plant Heritage members and raising funds for our work.

The charity recognises the commitment and hard work put in by the members of the groups who fundraise throughout the year and generously pass these contributions on to support the core work of the charity. In all, groups transferred £52,985 (2023: £62,395) to Central Office to help fund the charity's national work. Groups raised a total of £111,250 during the year (2023: £116,571), with the biggest amount raised through plant fairs.

Plant Heritage is also grateful to our affiliated groups in Guernsey and the Isle of Man and the Wiltshire Gardens Trust who provide important financial support.

## Structure, Governance and Management

Plant Heritage is a company limited by guarantee and is governed by its Memorandum and Articles of Association, adopted on 2 February 1988, amended in April 2004, April 2010 and July 2018.

### Directors and Trustees

The Board of Trustees are responsible for the overall governance of the charity. The Trustees are also the Directors of the Limited Company. Trustees are appointed by the Board and confirmed by the membership at the Annual General Meeting (AGM). At each AGM, one-third of the directors retire from office by rotation (those who have been longest in office since their last reappointment retire first). Directors retiring by rotation can seek reappointment provided they have served less than eight years in total (consecutive or otherwise) as specified in the Articles of Association. With effect from December 2024, new Directors are appointed by the board for an initial term of three years, renewable for a second term of three years. On an exceptional basis, new trustees may serve up to eight years.

Mrs Cecilia Bufton	Chairman. Appointed 5 <sup>th</sup> October 2017, re-appointed 4 <sup>th</sup> May 2019, reappointed 28 <sup>th</sup> April 2022
Mr James Muir Marshall	Vice-Chairman. Appointed 18 <sup>th</sup> April 2018, re-appointed 2 <sup>nd</sup> May 2020, reappointed 28 <sup>th</sup> April 2022
Mr Gareth Morgan	Treasurer. Appointed 10 <sup>th</sup> July 2020, reappointed 24 <sup>th</sup> April 2024
Ms Emma Crawforth	Appointed 26 <sup>th</sup> July 2018, re-appointed 17 <sup>th</sup> April 2021, reappointed 24 <sup>th</sup> April 2024
Dr Claire Farrer	Appointed 4 <sup>th</sup> December 2024
Ms Sally Flatman	Appointed 4 <sup>th</sup> December 2024
Ms Jasmine Jahromi	Appointed 4 <sup>th</sup> December 2024
Ms Kavita Kapoor	Appointed 14 <sup>th</sup> September 2022
Mr John Humphreys	Appointed 4 <sup>th</sup> December 2024
Mr David Mathers	Appointed 4 <sup>th</sup> December 2024
Sir Roderick Newton	Appointed 4 <sup>th</sup> December 2024
Mrs Sally Nex	Appointed 26 <sup>th</sup> July 2018, re-appointed 17 <sup>th</sup> April 2021, resigned 4 <sup>th</sup> December 2024
Mrs Catherine Penny	Appointed 5 <sup>th</sup> October 2017, re-appointed 2 <sup>nd</sup> May 2020, re-appointed 28 <sup>th</sup> April 2022. Resigned 4 <sup>th</sup> December 2024
Mr Jonathan Sheppard	Appointed 13 <sup>th</sup> December 2022, resigned 4 <sup>th</sup> January 2024
Mrs Della Weight	Appointed 4 <sup>th</sup> December 2024

The Board met formally on four occasions to discuss the management of the charity. Information about trustees is published on our [website](#).

### Governance changes

Plant Heritage held its 2023 and 2024 AGM virtually and plans to do so again in 2025. Members can vote either in person during the meeting, by mail (email or post) or by proxy. The charity's reserves policy has been updated (see Treasurer's Review). The remit of the Finance Committee has been expanded to include fundraising, in line with the aim to grow and diversify the charity's funding base for the future. The term for new trustees has been changed to three years, renewable

for a second term of three years. On an exceptional basis, trustees may serve up to the limit of eight years specified in the Articles of Association.

### **Risk Management**

Plant Heritage Trustees have considered the major risks to which the charity is exposed and review these at least annually through a documented risk register. Trustees are satisfied that established procedures are sufficient to manage and mitigate those risks.

### **Public benefit**

Plant Heritage conserves cultivated plants. Trustees have paid due regard to the Charity Commission guidance on public benefit in deciding how to pursue our objectives. Our Conservation Strategy details how we carry out our work and how we engage with the public.

### **Staffing**

Plant Heritage has a small team of 8 professional staff, equivalent to slightly over 5 full time staff as of 31<sup>st</sup> October 2024:

Gwen Hines	Chief Executive
Gill Groombridge	Business and Events Manager
Julia Cogan	Membership Team
Claire Ader	Membership Team
Mimi Wong	Finance Officer
Liz Edwards	Conservation Adviser
Lucy Pitman	Conservation Adviser
Kalani Seymour	Threatened Plants Programme Manager

A new Plant Records Officer will start in Spring 2025, taking the staff complement to 9 (the equivalent of 6 full time staff). Information about staff roles is [published on our website](#).

The Board of Trustees wish to thank all the members of staff for their expertise, loyalty, resourcefulness, and commitment to the work of Plant Heritage.



## Board Committees and Working Groups (as of 1 January 2025)

<p><b>Finance &amp; Fundraising Committee</b> <i>Meetings four times a year</i></p> <ul style="list-style-type: none"> <li>• Helen Moorcraft (Chair)</li> <li>• Cecilia Bufton</li> <li>• Margaret Hughes</li> <li>• Gareth Morgan</li> <li>• Della Weight</li> <li>• Philip Wilson</li> </ul>	<p><b>Conservation Committee</b> <i>Meetings three times a year</i> Development of Conservation Strategy and delivery of associated programmes and activities</p> <ul style="list-style-type: none"> <li>• Jim Marshall (Chair)</li> <li>• Emma Crawforth (Vice Chair)</li> <li>• Paul Bartlett</li> <li>• Alison Crook</li> <li>• Catrina Fenton</li> <li>• Andrew Gaunt</li> <li>• Sir Roderick Newton</li> <li>• Simon Toomer</li> <li>• Tim Upson</li> <li>• Frances Williams</li> <li>• Rosie Yeomans</li> </ul>
<p><b>Membership &amp; Supporters Committee</b> Development of membership strategies, advice, support and guidance to groups <i>Meetings three times a year</i></p> <ul style="list-style-type: none"> <li>• Catherine Penny (Chair)</li> <li>• Rosemary Buisseret</li> <li>• Claire Farrer</li> <li>• Jasmine Jahrome</li> <li>• John Humphreys</li> <li>• Penny Ross</li> </ul>	<p><b>Plant Collections Committee</b> Accreditation of National Plant Collections <i>Meetings four times a year</i></p> <ul style="list-style-type: none"> <li>• Tim Upson (Chair)</li> <li>• Jonathan Webster (Vice-Chair)</li> <li>• Matthew Biggs</li> <li>• Chris Bird</li> <li>• Chris Clennett</li> <li>• Dawn Edwards</li> <li>• Gary Firth</li> <li>• Kevin Hobbs</li> <li>• David Mathers</li> <li>• Madeleine Tinson</li> <li>• Chris Trimmer</li> <li>• Rosie Yeomans</li> </ul>
<p><b>Persephone Working Group</b> <i>Meetings three times a year</i></p> <ul style="list-style-type: none"> <li>• Doug Smith (Chair)</li> <li>• Barry Clarke</li> <li>• Gary Firth</li> <li>• Alex New</li> <li>• David Ross</li> <li>• Penny Ross</li> </ul>	
<p><b>Governance &amp; People Committee</b> Governance, compliance, processes, policies, and guidelines. <i>Meetings four times a year</i></p> <ul style="list-style-type: none"> <li>• Elizabeth Smith (Chair)</li> <li>• Cecilia Bufton</li> <li>• Kristopher Harper Allison</li> <li>• Margaret Headen</li> <li>• Jim Marshall</li> <li>• Anthony Nichols</li> </ul>	

## **Business Plan 2025**

### Conserving the diversity of garden plants for the future

1. Increase the number & diversity of cultivated plants conserved through the National Plant Collections and the Plant Guardian scheme
2. Support National Collection Holders to achieve high standards, to embed sustainability and to develop continuity plans so their Collections are preserved for the future, along with digital records
3. Inform & engage others about our work, including sharing data, knowledge & skills of wider benefit
4. Influence UK and global thinking on issues related to plant conservation and apply best practice in our own work, including on environmental sustainability and biodiversity

### Engaging more people in our work

5. Grow & diversify the membership of Plant Heritage, including more young people
6. Support our network of local groups, complemented by online events
7. Continue to raise the profile of Plant Heritage's work in the UK and beyond, with a view to increasing membership, donations and support for our work, and harness strategic partnerships

### Organisational Effectiveness

8. Develop and implement a diversified funding model to sustain our work over the medium term
9. Continue to strengthen Plant Heritage's governance & ways of working, including data and financial management, adopting best practice & harnessing digital innovations where appropriate
10. Create a working environment in which staff & volunteers feel engaged and valued

## Statement of Trustees' Responsibilities

Company law requires the Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charity and of the surplus or deficit for that period. In preparing these financial statements, the Trustees have in their opinion:

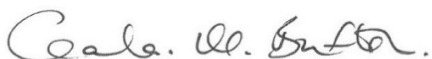
- selected suitable accounting policies and then applied them consistently;
- made judgements and estimates that are reasonable and prudent;
- ensured that the applicable accounting standards have been followed; and
- prepared the financial statements on the going concern basis.

The Trustees have been responsible for keeping proper accounting records which disclose, with reasonable accuracy at any time, the financial position of the charity and which have enabled them to ensure that the financial statements comply with the Companies Act 2006. They have also been responsible for the safeguarding of the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

### Statement of Disclosure of Information to Independent Examiner

So far as the Trustees are aware, there is no relevant information of which the Charity's Independent Examiner has not been informed.

Approved by the Board of Trustees on 20 March 2025 and signed on their behalf by:



**Trustee and Chairman**  
Mrs Cecilia Bufton



**Trustee and Treasurer**  
Mr Gareth Morgan

# PLANT HERITAGE

## INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PLANT HERITAGE

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I report to the trustees on my examination of the financial statements of Plant Heritage (the charity) for the year ended 31 October 2024.

### **Responsibilities and basis of report**

As the trustees of the charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities and Trustee Investment (Scotland) Act 2005 (the 2005 Act), the Charities Accounts (Scotland) Regulations 2006 (as amended) and the Companies Act 2006 (the 2006 Act). You are satisfied that the financial statements of the charity are not required by charity or company law to be audited and have chosen instead to have an independent examination.

Having satisfied myself that the accounts of the charity are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the charity's accounts carried out under section 44 (1) (c) of the 2005 Act and section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed the requirements of Regulation 11 of the Charities Accounts (Scotland) Regulations 2006 (as amended) and all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

### **Independent examiner's statement**

Since the charity is required by company law to prepare its accounts on an accruals basis and is registered as a charity in Scotland your examiner must be a member of a body listed in Regulation 11(2) of the Charities Accounts (Scotland) Regulations 2006 (as amended). I confirm that I am qualified to undertake the examination because I am a member of the Association of Chartered Certified Accountants, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act and Regulation 4 of the 2006 Accounts Regulations; or
- 2 the financial statements do not accord with those records; or
- 3 the financial statements do not comply with the accounting requirements of Regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended) and do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
- 4 the financial statements have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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

**Frances Wilde FCCA DChA**

Warner Wilde  
Chartered Certified Accountants  
4 Marigold Drive  
Bisley  
Surrey  
GU24 9SF

Dated: .1 April 2025.....



# PLANT HERITAGE

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

**FOR THE YEAR ENDED 31 OCTOBER 2024**

Current financial year		Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Restricted funds 2024 £	Total 2024 £	Total 2023 £
	Notes					
<b>Income from:</b>						
Donations and legacies	3	87,502	2,245	11,292	101,039	349,050
Charitable activities	4	150,057	105,025	-	255,082	254,241
Other trading activities	5	16,053	3,278	-	19,331	22,981
Investments	6	29,034	702	-	29,736	12,843
<b>Total income</b>		<u>282,646</u>	<u>111,250</u>	<u>11,292</u>	<u>405,188</u>	<u>639,115</u>
<b>Expenditure on:</b>						
<u>Raising funds</u>						
Fundraising and publicity	7	7,366	-	-	7,366	3,194
<u>Charitable activities</u>						
Memberships and shows	8	76,059	2,705	-	78,764	61,383
Educational Activities	8	85,342	62,671	1,466	149,479	154,597
Plant Conservation	8	213,914	1,916	10,483	226,313	233,070
<b>Total charitable expenditure</b>		<u>375,315</u>	<u>67,292</u>	<u>11,949</u>	<u>454,556</u>	<u>449,050</u>
<b>Total expenditure</b>		<u>382,681</u>	<u>67,292</u>	<u>11,949</u>	<u>461,922</u>	<u>452,244</u>
<b>Net income/(expenditure)</b>		(100,035)	43,958	(657)	(56,734)	186,871
Transfers between funds		90,518	(90,518)	-	-	-
<b>Net movement in funds</b>	11	(9,517)	(46,560)	(657)	(56,734)	186,871
<b>Reconciliation of funds:</b>						
Fund balances at 1 November 2023		591,783	235,990	24,077	851,850	664,979
<b>Fund balances at 31 October 2024</b>		<u>582,266</u>	<u>189,430</u>	<u>23,420</u>	<u>795,116</u>	<u>851,850</u>

The statement of financial activities includes all gains and losses recognised in the year. All income and expenditure derive from continuing activities.

# PLANT HERITAGE

## STATEMENT OF FINANCIAL ACTIVITIES (CONTINUED) INCLUDING INCOME AND EXPENDITURE ACCOUNT

**FOR THE YEAR ENDED 31 OCTOBER 2024**

Prior financial year		Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Restricted funds 2023 £	Total 2023 £
	Notes				
<b>Income from:</b>					
Donations and legacies	3	301,311	1,993	45,746	349,050
Charitable activities	4	147,348	106,893	-	254,241
Other trading activities	5	15,804	7,177	-	22,981
Investments	6	12,335	508	-	12,843
<b>Total income</b>		476,798	116,571	45,746	639,115
<b>Expenditure on:</b>					
<u>Raising funds</u>					
Fundraising and publicity	7	3,194	-	-	3,194
Memberships and shows	8	40,839	14,762	5,782	61,383
Educational Activities	8	82,303	69,294	3,000	154,597
Plant Conservation	8	191,117	1,662	40,291	233,070
<b>Total expenditure</b>		317,453	85,718	49,073	452,244
<b>Net income/(expenditure)</b>		159,345	30,853	(3,327)	186,871
Transfers between funds		62,395	(62,395)	-	-
<b>Net movement in funds</b>	11	221,740	(31,542)	(3,327)	186,871
<b>Reconciliation of funds:</b>					
Fund balances at 1 November 2022		370,043	267,532	27,404	664,979
<b>Fund balances at 31 October 2023</b>		591,783	235,990	24,077	851,850

# PLANT HERITAGE

## BALANCE SHEET

AS AT 31 OCTOBER 2024

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		2024		2023	
	Notes	£	£	£	£
<b>Fixed assets</b>					
Intangible assets	15		65,800		79,610
Tangible assets	16		4,923		4,708
			<u>70,723</u>		<u>84,318</u>
<b>Current assets</b>					
Debtors	17	29,525		16,609	
Cash at bank and in hand		732,206		791,991	
		<u>761,731</u>		<u>808,600</u>	
<b>Creditors: amounts falling due within one year</b>	18	(32,725)		(35,105)	
		<u>729,006</u>		<u>773,495</u>	
<b>Net current assets</b>			729,006		773,495
<b>Total assets less current liabilities</b>			799,729		857,813
<b>Creditors: amounts falling due after more than one year</b>					
Deferred income	20	4,613		5,963	
		<u>(4,613)</u>		<u>(5,963)</u>	
<b>Net assets</b>			795,116		851,850
			<u><u>795,116</u></u>		<u><u>851,850</u></u>
<b>The funds of the charity</b>					
Restricted income funds	23		23,420		24,077
Unrestricted funds - general	24		582,266		591,783
Unrestricted funds - designated	22		189,430		235,990
			<u>795,116</u>		<u>851,850</u>
			<u><u>795,116</u></u>		<u><u>851,850</u></u>

# PLANT HERITAGE

## BALANCE SHEET (CONTINUED)

**AS AT 31 OCTOBER 2024**

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The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 October 2024.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the trustees on 20 March 2025.



Mr G Morgan

### **Trustee**

Company registration number 2222953 (England and Wales)

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 OCTOBER 2024

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### 1 Accounting policies

#### Charity information

Plant Heritage is a private company limited by guarantee incorporated in England and Wales. The registered office is First floor offices, Stone Pine House, Wisley, Woking, Surrey, GU23 6QD.

#### 1.1 Accounting convention

The financial statements have been prepared in accordance with the charity's governing document, the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)". The charity is a Public Benefit Entity as defined by FRS 102.

The charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The financial statements are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention, [modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value]. The principal accounting policies adopted are set out below.

#### 1.2 Going concern

At the time of approving the financial statements, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

#### 1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors or grantors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

#### 1.4 Income

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Cash donations are recognised on receipt. Other donations are recognised once the charity has been notified of the donation, unless performance conditions require deferral of the amount. Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.

Legacies are recognised on receipt or otherwise if the charity has been notified of an impending distribution, the amount is known, and receipt is expected. If the amount is not known, the legacy is treated as a contingent asset.



# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2024

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### 1 Accounting policies

(Continued)

#### 1.5 Expenditure

A liability is recognised when either a constructive or legal obligation is identified. Central costs are apportioned between costs of generating funds and charitable activities on the basis of the specific activities of members of staff. Irrecoverable VAT is allocated to the same expenditure heading as the cost to which it relates. Basic financial liabilities are recognised at transaction cost.

#### 1.6 Intangible fixed assets other than goodwill

Intangible assets acquired separately from a business are recognised at cost and are subsequently measured at cost less accumulated amortisation and accumulated impairment losses.

Intangible assets acquired on business combinations are recognised separately from goodwill at the acquisition date where it is probable that the expected future economic benefits that are attributable to the asset will flow to the entity and the fair value of the asset can be measured reliably; the intangible asset arises from contractual or other legal rights; and the intangible asset is separable from the entity.

Amortisation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Website	8 Years Straight Line
Persephone intangibles	4 years straight line

#### 1.7 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Plant and machinery	4 Years Straight Line
Computers	4 Years Straight Line

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in the statement of financial activities.

#### 1.8 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

#### 1.9 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 OCTOBER 2024

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#### 1 Accounting policies

(Continued)

##### 1.10 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the charity's balance sheet when the charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

##### **Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

##### **Basic financial liabilities**

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

##### **Derecognition of financial liabilities**

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

##### 1.11 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

##### 1.12 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) *FOR THE YEAR ENDED 31 OCTOBER 2024*

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### **2 Critical accounting estimates and judgements**

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2024

### 3 Income from donations and legacies

	Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Restricted funds 2024 £	Total 2024 £	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Restricted funds 2023 £	Total 2023 £
Donations and gifts	76,026	2,245	6,000	84,271	48,005	1,993	6,333	56,331
Legacies	11,476	-	-	11,476	250,581	-	-	250,581
Grants	-	-	5,292	5,292	2,725	-	39,413	42,138
	<u>87,502</u>	<u>2,245</u>	<u>11,292</u>	<u>101,039</u>	<u>301,311</u>	<u>1,993</u>	<u>45,746</u>	<u>349,050</u>

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

### 4 Income from charitable activities

	Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Total 2024 £	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Total 2023 £
<b>Memberships and shows</b>						
Sales within charitable activities	142,252	-	142,252	141,810	-	141,810
<b>Educational Meetings and Events held by Area Groups</b>						
Sales within charitable activities	7,805	105,025	112,830	5,538	106,893	112,431
	<u>150,057</u>	<u>105,025</u>	<u>255,082</u>	<u>147,348</u>	<u>106,893</u>	<u>254,241</u>

### 5 Income from other trading activities

	Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Total 2024 £	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Total 2023 £
Advertising, publications, sponsorship and trading	16,053	-	16,053	15,804	-	15,804
Fundraising events	-	3,278	3,278	-	7,177	7,177
Total other trading activities	<u>16,053</u>	<u>3,278</u>	<u>19,331</u>	<u>15,804</u>	<u>7,177</u>	<u>22,981</u>

### 6 Income from investments

	Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Total 2024 £	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Total 2023 £
Interest receivable	<u>29,034</u>	<u>702</u>	<u>29,736</u>	<u>12,335</u>	<u>508</u>	<u>12,843</u>



## PLANT HERITAGE

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

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#### 7 Expenditure on raising funds

	Unrestricted funds 2024 £	Unrestricted funds 2023 £
<b>Costs of generating donations and legacies</b>		
Staging fundraising events	216	731
Other fundraising costs	7,150	-
Depreciation and impairment	-	625
Support costs	-	1,838
	<u>7,366</u>	<u>3,194</u>

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2024

### 8 Charitable activities

	Membership and Shows 2024 £	Educational Activities 2024 £	Plant Conservation 2024 £	Total 2024 £	Membership and Shows 2023 £	Educational Activities 2023 £	Plant Conservation 2023 £	Total 2023 £
Staff costs	33,260	33,259	96,806	163,325	23,530	23,495	102,650	149,675
Depreciation and impairment	7,234	7,233	21,700	36,167	5,248	5,248	22,930	33,426
Other charitable expenditure	19,236	89,952	48,787	157,975	15,726	108,759	32,254	156,739
	<u>59,730</u>	<u>130,444</u>	<u>167,293</u>	<u>357,467</u>	<u>44,504</u>	<u>137,502</u>	<u>157,834</u>	<u>339,840</u>
Grant funding of activities (see note 9)	-	-	1,916	1,916	-	216	1,662	1,878
Share of support costs (see note 10)	16,506	16,508	49,523	82,537	15,421	15,421	67,376	98,218
Share of governance costs (see note 10)	2,528	2,527	7,581	12,636	1,458	1,458	6,198	9,114
	<u>78,764</u>	<u>149,479</u>	<u>226,313</u>	<u>454,556</u>	<u>61,383</u>	<u>154,597</u>	<u>233,070</u>	<u>449,050</u>
<b>Analysis by fund</b>								
Unrestricted funds - general	76,059	85,342	213,914	375,315	40,839	82,303	191,117	314,259
Unrestricted funds - designated	2,705	62,671	1,916	67,292	14,762	69,294	1,662	85,718
Restricted funds	-	1,466	10,483	11,949	5,782	3,000	40,291	49,073
	<u>78,764</u>	<u>149,479</u>	<u>226,313</u>	<u>454,556</u>	<u>61,383</u>	<u>154,597</u>	<u>233,070</u>	<u>449,050</u>

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

### 9 Grants payable

	Plant Conservation 2024 £	Total 2024 £	Educational Activities 2023 £	Plant Conservation 2023 £	Total 2023 £
Grants to institutions:					
Other	1,916	1,916	-	1,662	1,662
Grants to individuals	-	-	216	-	216
	<u>1,916</u>	<u>1,916</u>	<u>216</u>	<u>1,662</u>	<u>1,878</u>

### 10 Support costs allocated to activities

	2024 £	2023 £
Staff costs	40,385	27,033
Office costs	42,153	73,023
Governance costs	12,635	9,114
	<u>95,173</u>	<u>109,170</u>
<b>Analysed between:</b>		
Fundraising	-	1,838
Memberships and shows	19,034	16,879
Educational Activities	19,035	16,879
Plant Conservation	57,104	73,574
	<u>95,173</u>	<u>109,170</u>

	2024 £	2023 £
<b>Governance costs comprise:</b>		
Independent Examination / Audit	4,392	7,914
Legal and professional fees	8,104	1,200
Other governance costs	139	-
	<u>12,635</u>	<u>9,114</u>

### 11 Net movement in funds

	2024 £	2023 £
The net movement in funds is stated after charging/(crediting):		
Depreciation of owned tangible fixed assets	2,485	3,945
Amortisation of intangible assets	33,682	30,107
	<u>36,167</u>	<u>34,052</u>

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

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### 12 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year.

1 of the trustees (2023: none) incurred reimbursed travel expenses of £19.

### 13 Employees

The average monthly number of employees during the year was:

	<b>2024</b>	<b>2023</b>
	<b>Number</b>	<b>Number</b>
Plant Conservation	3	4
Membership	2	1
Finance and admin	1	1
	<hr/>	<hr/>
Total	6	6
	<hr/> <hr/>	<hr/> <hr/>

#### Employment costs

	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Wages and salaries	184,682	161,318
Social security costs	9,873	7,341
Other pension costs	9,155	8,049
	<hr/>	<hr/>
	203,710	176,708
	<hr/> <hr/>	<hr/> <hr/>

8 (2023: 8) part time employees equate to 5 (2023: 6) full time staff.

There were no employees whose annual remuneration was more than £60,000.

#### Remuneration of key management personnel

The remuneration of key management personnel was as follows:

Chief Executive, Business Manager and Conservation Manager roles.

	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Aggregate compensation	99,118	56,482
	<hr/> <hr/>	<hr/> <hr/>

### 14 Taxation

The charity is exempt from taxation on its activities because all its income is applied for charitable purposes.

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

### 15 Intangible fixed assets

	Website £	Persephone intangibles £	Total £
<b>Cost</b>			
At 1 November 2023	59,336	97,146	156,482
Additions - internally developed	4,194	15,681	19,875
	<hr/>	<hr/>	<hr/>
At 31 October 2024	63,530	112,827	176,357
	<hr/>	<hr/>	<hr/>
<b>Amortisation and impairment</b>			
At 1 November 2023	32,864	44,011	76,875
Amortisation charged for the year	7,417	26,265	33,682
	<hr/>	<hr/>	<hr/>
At 31 October 2024	40,281	70,276	110,557
	<hr/>	<hr/>	<hr/>
<b>Carrying amount</b>			
At 31 October 2024	23,249	42,551	65,800
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
At 31 October 2023	26,475	53,135	79,610
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

### 16 Tangible fixed assets

	Plant and machinery £	Computers £	Total £
<b>Cost</b>			
At 1 November 2023	2,909	15,600	18,509
Additions	-	2,700	2,700
	<hr/>	<hr/>	<hr/>
At 31 October 2024	2,909	18,300	21,209
	<hr/>	<hr/>	<hr/>
<b>Depreciation and impairment</b>			
At 1 November 2023	744	13,057	13,801
Depreciation charged in the year	727	1,758	2,485
	<hr/>	<hr/>	<hr/>
At 31 October 2024	1,471	14,815	16,286
	<hr/>	<hr/>	<hr/>
<b>Carrying amount</b>			
At 31 October 2024	1,438	3,485	4,923
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
At 31 October 2023	2,165	2,543	4,708
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>



# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

### 17 Debtors

	<b>2024</b>	<b>2023</b>
	£	£
<b>Amounts falling due within one year:</b>		
Trade debtors	7,131	5,870
Other debtors	18,467	7,380
Prepayments and accrued income	3,927	3,359
	<u>29,525</u>	<u>16,609</u>

### 18 Creditors: amounts falling due within one year

	<b>Notes</b>	<b>2024</b>	<b>2023</b>
		£	£
Deferred income	<b>20</b>	18,520	17,447
Trade creditors		-	7,548
Other creditors		6,946	36
Accruals		7,259	10,074
		<u>32,725</u>	<u>35,105</u>

### 19 Creditors: amounts falling due after more than one year

	<b>Notes</b>	<b>2024</b>	<b>2023</b>
		£	£
Deferred income	<b>20</b>	4,613	5,963

### 20 Deferred income

	<b>2024</b>	<b>2023</b>
	£	£
Other deferred income	23,133	23,410

Deferred income is included in the financial statements as follows:

	<b>2024</b>	<b>2023</b>
	£	£
Deferred income is included within:		
Current liabilities	18,520	17,447
Non-current liabilities	4,613	5,963
	<u>23,133</u>	<u>23,410</u>

Movements in the year:

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

20 Deferred income	(Continued)	
Deferred income at 1 November 2023	23,410	28,331
Released from previous periods	(16,097)	(28,331)
Resources deferred in the year	15,820	23,410
	<u>23,133</u>	<u>23,410</u>
Deferred income at 31 October 2024	<u>23,133</u>	<u>23,410</u>

21 Retirement benefit schemes	2024	2023
Defined contribution schemes	£	£
Charge to profit or loss in respect of defined contribution schemes	9,155	8,049
	<u>9,155</u>	<u>8,049</u>

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently administered fund.

## 22 Unrestricted funds - designated

These are unrestricted funds which are material to the charity's activities.

	At 1 November 2023 £	Incoming resources £	Resources expended £	Transfers At 31 October 2024 £	
Area Groups	145,752	111,250	(64,587)	(52,985)	139,430
Office Move	1,865	-	(1,865)	-	-
IT investments/CRM	28,373	-	(840)	22,467	50,000
Risk Reserve	60,000	-	-	(60,000)	-
	<u>235,990</u>	<u>111,250</u>	<u>(67,292)</u>	<u>(90,518)</u>	<u>189,430</u>
<b>Previous year:</b>	<b>At 1 November 2022 £</b>	<b>Incoming resources £</b>	<b>Resources expended £</b>	<b>Transfers At 31 October 2023 £</b>	
Area Groups	162,532	116,571	(70,956)	(62,395)	145,752
Office Move	15,000	-	(13,135)	-	1,865
CRM	30,000	-	(1,627)	-	28,373
Risk Reserve	60,000	-	-	-	60,000
	<u>267,532</u>	<u>116,571</u>	<u>(85,718)</u>	<u>(62,395)</u>	<u>235,990</u>

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 OCTOBER 2024

### 22 Unrestricted funds - designated

(Continued)

#### Area Groups

Area Groups carry out activities throughout the year in accordance with the charity's objectives whilst remaining sympathetic and relevant to each group as defined by its members and geographical location. The Designated Fund represents the income and expenditure from group activities and the value retained in bank accounts as at the period end.

#### Project Fund

The Project Fund provides for spending on specific projects planned for the short to medium term.

#### Office Move

To fund the relocation costs associated with changing office.

#### CRM

To fund a new customer relationship management system.

#### Risk Reserve

For future operational shocks such as COVID.

### 23 Restricted funds

The restricted funds of the charity comprise the unexpended balances of donations and grants held on trust subject to specific conditions by donors as to how they may be used.

	At 1 November 2023	Incoming resources	Resources expended	At 31 October 2024
	£	£	£	£
	-	-	-	-
Heritage Lottery	11,589	5,292	(6,544)	10,337
RHS - Research	-	2,500	(1,000)	1,500
RHS - Workshops	-	1,500	(466)	1,034
Heather Society	6,500	-	-	6,500
Persephone	5,988	2,000	(3,939)	4,049
	<u>24,077</u>	<u>11,292</u>	<u>(11,949)</u>	<u>23,420</u>

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

### 23 Restricted funds

(Continued)

Previous year:	At 1 November 2022	Incoming resources	Resources expended	At 31 October 2023
	£	£	£	£
Shanly Foundation	-	2,500	(2,500)	-
Stanley Smith Horticultural Trust	-	3,800	(3,800)	-
Heritage Lottery	10,952	39,413	(38,776)	11,589
Tanner Trust	907	-	(907)	-
Heather Society	6,500	-	-	6,500
Persephone	8,045	33	(2,090)	5,988
West Midlands Shows Fund	1,000	-	(1,000)	-
	<u>27,404</u>	<u>45,746</u>	<u>49,073</u>	<u>24,077</u>

**Heritage Lottery** - Funding for a Digital Volunteer Officer, saving and sharing digital plant heritage.

**Persephone** - Funding for the development and operation of an online horticultural database developed for recording plants in collections.

**RHS Research** - For research bursaries.

**RHS Workshops** - Assistance fund for those attending Plant Heritage workshops.

**Heather Society** - For the advancement of horticulture, in particular conservation, improvement and research into the growing of heaths, heathers and allied plants.

**The Stanley Smith Horticultural Trust** - Funding for the national collection holders' conference and 45th Sapphire celebration event.

**Shanly Foundation** - Funding for a display garden at the RHS Hampton Court Flower Show.

**Tanner Trust** - Funding for JSTOR licences (an online platform providing access to research articles).

### 24 Unrestricted funds

The unrestricted funds of the charity comprise the unexpended balances of donations and grants which are not subject to specific conditions by donors and grantors as to how they may be used. These include designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes.

	At 1 November 2023	Incoming resources	Resources expended	Transfers	At 31 October 2024
	£	£	£	£	£
General funds	<u>591,783</u>	<u>282,646</u>	<u>(382,681)</u>	<u>90,518</u>	<u>582,266</u>

# PLANT HERITAGE

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 OCTOBER 2024

### 24 Unrestricted funds (Continued)

Previous year:	At 1 November 2022	Incoming resources	Resources expended	Transfers	At 31 October 2023
	£	£	£	£	£
General funds	370,043	476,798	(317,453)	62,395	591,783

### 25 Analysis of net assets between funds

	Unrestricted funds general 2024 £	Unrestricted funds designated 2024 £	Restricted funds 2024 £	Total 2024 £
<b>At 31 October 2024:</b>				
Intangible fixed assets	64,674	-	1,126	65,800
Tangible assets	4,923	-	-	4,923
Current assets/(liabilities)	517,282	189,430	22,294	729,006
Long term liabilities	(4,613)	-	-	(4,613)
	<u>582,266</u>	<u>189,430</u>	<u>23,420</u>	<u>795,116</u>
	Unrestricted funds general 2023 £	Unrestricted funds designated 2023 £	Restricted funds 2023 £	Total 2023 £
<b>At 31 October 2023:</b>				
Intangible fixed assets	77,984	-	1,626	79,610
Tangible assets	4,708	-	-	4,708
Current assets/(liabilities)	515,054	235,990	22,451	773,495
Long term liabilities	(5,963)	-	-	(5,963)
	<u>591,783</u>	<u>235,990</u>	<u>24,077</u>	<u>851,850</u>



*Origanum 'Kent Beauty'*

Please get in touch if you would like to know more:

[www.plantheritage.org.uk](http://www.plantheritage.org.uk)

Email: [Info@PlantHeritage.org.uk](mailto:Info@PlantHeritage.org.uk)

Or call us on 01483 447540

Address: First Floor Offices, Stone Pine, Wisley Lane,  
Wisley, Woking, Surrey, GU23 6QD, UK