



the friends  
of Westonbirt  
Arboretum  
Registered Charity 293190

# Annual Review

01 January - 31 December 2023

# Reference & administrative details

## Registered charity name

Friends of Westonbirt Arboretum

## Company number

04965522

## Charity number

293190

## Registered office

Great Oak Hall  
Westonbirt, The National Arboretum  
Westonbirt  
Gloucestershire  
GL8 8QS

## Key Management Personnel

### Trustees

Trustees, who are also directors under company law, who served during the year and up to the date of this report, and the subcommittees on which they served, were as follows:

E Bottrill (resigned 4 May 2023)	1
O Forster	2
N Frost (appointed 13 July 2023)	3
L Grant (retired 13 July 2023)	1
M Green (resigned 28 November 2023)	1
P Isherwood	1
M Mintram (retired 12 October 2023)	
N Sachdev (appointed 13 July 2023)	1,2,3
M Smith	2,3
S Troupe	2
C Walker (appointed 13 July 2023)	1
R Walker	4
A Woods (resigned 23 February 2024)	1

### Committees to the board

1. Joint Working Panel
2. Finance and Risk Panel
3. Enterprise Board
4. Human Resources

### Chairperson

M Green (Disbanded on 15 December 2023)  
M Smith  
M Smith (Nigel Frost from 15 December 2023)  
R Walker

The Chair of Trustees has an ex-officio appointment on all committees

### Senior leadership team

The management of The Friends is overseen by a senior leadership team employed by the Trust during the year. This comprised as follows:

E Griffiths	Chief Executive
H Turner	Finance Director

### Bankers

Lloyds Bank PLC	CAF Bank Ltd	CCLA Investment
14 Castle Street	25 Kings Hill Avenue	Management Ltd
Cirencester	West Malling	80 Cheapside
Gloucestershire	Kent	London
GL7 1QJ	ME19 4JQ	EC2V 6DZ

### Auditors

Godfrey Wilson Limited  
Chartered accountants and  
statutory auditors  
5th Floor Mariner House  
62 Prince Street  
Bristol  
BS1 4QD



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# 2023 highlights



Secured £180,000 in fundraising



Free Will writing partnership



Raised over £1,650 from contactless donation boxes



Volunteers signed up 695 members

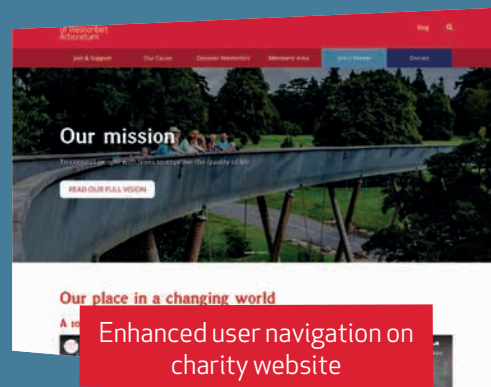


Single membership

£42 a year

One adult + up to 4 children  
(children aged 18 and under)

Increased annual membership rates



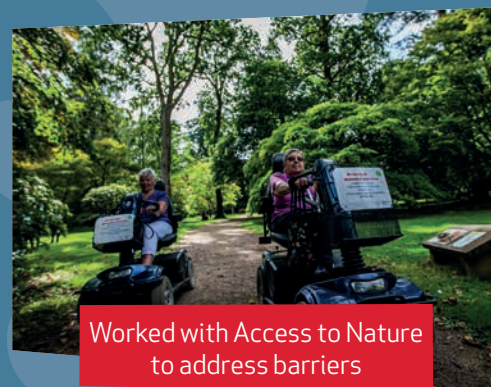
Enhanced user navigation on charity website



Interpretation installed to celebrate our history



Secured numerous funded roles to FE



Worked with Access to Nature to address barriers









# Chair's statement

In 2023, our dedicated and long-standing outgoing Chair, Mike Mintram, concluded his 3 term, 9 year tenure with us. On behalf of our entire community, we extend heartfelt gratitude for his unwavering stewardship and inspirational leadership throughout his tenure. Trustee, Gavin Grant, also retired from his position after 9 years of diligent service to the Charity and we also received resignations from Martin Green and Beth Bottrill during the year and extend our thanks to them for their invaluable contributions during their respective tenures. As we bid farewell, we warmly welcomed new additions to our Board of Trustees, including myself as Chair, alongside Christian Walker and Nigel Frost, who bring invaluable expertise and energy to our cause.

We can record with pride that during 2023, The Friends agreed to new grant commitments of £226,118 in support of Arboretum projects. It is good to see many projects completed, or near completion, including the Green Woodworking Shelter which complements the Community Shelter very well and is getting good use from community groups. We have had a successful fundraising year and secured £156,637 for the Silk Wood Community Planting Project. The site is now cleared, and community groups are engaged in planting. It is really exciting to see this space come back to life, and we continue to fundraise over the coming year for this project. This and other projects are discussed in greater detail within this report.

During the year we paid out a total of £297,650 against previously committed grants to Forestry England projects and other third parties whose work will enhance and develop the site. These include; ongoing funding of a PhD student to carry out research in partnership with the University of the West of England (UWE), the ongoing Coppice Apprenticeship and from our Community Grant Giving we supported children and families to access the Forestry England Wild Wonder Children's Literature Festival.

In addition to supporting Forestry England through the provision of grants, we also provided £20,124 in Shop rental and £718,718 Arboretum Access Rights payments (AARP). The AARP that we





make to Forestry England allows our members free access to the site during usual opening hours. This income goes directly to the running of the site, contributing a sizeable proportion of the site's overall income.

Through our trading subsidiary, the Shop, we ensure a vibrant retail experience that enhances visitor enjoyment while generating essential revenue for site maintenance and development. We recruited a new Buying & Retail Manager in 2023, and he has quickly got to work with securing new product lines that further complement the site and are locally sourced, where possible.

The Friends staff continue to build strong collaborative relationships with Forestry England staff, both on site and at a national level. We are continuing to work collaboratively, developing plans for the site and in particular joint fundraising activity to make these plans become a reality. In 2024, we are looking forward to supporting the emerging Masterplan and proposed works to continue to achieve the 10-year vision for the site: 'To be a world leader in trees, inspiring people through education, participation and conservation.'

As we embark on this journey, we extend heartfelt thanks to our Members and Supporters for their continued commitment to the site.

*N. Sachdev*

**Neil Sachdev**  
Chair of the Board of Trustees







# About the charity

Westonbirt, The National Arboretum (the arboretum) is the location for a historic, Victorian picturesque landscape and internationally important tree and shrub collection that is managed by Forestry England with the support of the The Friends. The nearly 15,000 labelled specimens come from Britain, China, North America, Japan, Chile and other temperate climates.

The arboretum covers 600 acres and consists of three main areas: the Old Arboretum is a carefully designed landscape dating from the 1850s offering beautiful vistas, stately avenues and trees from around the world; Silk Wood is an ancient, semi-natural woodland which has exotic planting throughout its landscape; and the Downs is Grade 1 registered and hosts species-rich grassland.

The Friends is a local Charity with over 36,000 members. Its mission is to further the public enjoyment and knowledge of Westonbirt Arboretum and to secure its sustainable future.





The Charity was established in 1985 by a small group of enthusiasts who were committed to the preservation and development of this unique landscape. The Charity works closely with Forestry England to support their aspirations for the long-term development of the arboretum.

The Charity has a dual legal status as a registered company regulated under company law, and as a registered Charity regulated under Charity law. It is governed for public benefit by the Trustee Board according to the Charity's Articles. The strategic direction and development of the Charity is managed by the Trustee Board, alongside an established Finance and Risk Committee providing additional financial control. The day-to-day operation of the Charity is delegated to the Chief Executive and staff team.

The Charity is committed to good governance and good practice in fundraising, having voluntarily chosen to follow the Code of Fundraising Practice (as overseen by the Fundraising Regulator) and the Charity Governance Code (as endorsed by the Charity Commission).



# Structure, governance & management

## **Governing document**

The governing document is the Memorandum and Articles of Association incorporated on 17 November 2003, as amended by special resolutions in 2008, 2011, 2012, 2014 and 2018.

The Friends is a membership and fundraising organisation for Westonbirt, The National Arboretum and as of 31 December 2023 we had 36,418 Members. The Board is accountable to the Charity Commission as a registered Charity.

## **Recruitment and appointment of Trustees**

There are currently eight Trustees on the Board. Trustees are recruited following a skills audit of Board members to ensure that the Board has the right mix of skills and experience. The services of a recruitment consultant may be used to recruit new Trustees. Trustees are required to retire from office following the completion of their term of office, serving a maximum of three terms of office. There is an induction process to support new Trustees, set out in the Trustee policy, including meetings with key staff and stakeholders and offers training and development opportunities.

The Board meets at least five times during the year. There are also three subcommittees: a Joint Working Panel (disbanded in December 2023), an Enterprise Board and a Finance and Risk Panel, which meet four to five times per year. Additionally, there is a Human Resources Panel which is convened when needed. Membership of committees is set out on page 1.

The Trustees have continued to keep The Friends' governance needs and the diversity of the Board under review. The Trustees are responsible for staff pay, benefits and terms and conditions. Detailed oversight of finance is delegated specifically to the elected Treasurer who works closely with the Finance Director and keeps the Board informed.

## **Risk management**

Risk is managed through a risk management register and detailed policy; this is reviewed by the CEO alongside a Trustee with specialist expertise in risk management who reports to the full Board. Major risks are reviewed annually by the full Board and are kept under review on a quarterly basis by the Finance and Risk Panel. The Board monitors impact, probability, mitigations taken, and identifies any additional action required. Key potential risks facing The Friends that require careful monitoring include the impact of any major changes in membership recruitment and retention which is often influenced by the current economic climate. Other risks are cyber security and data protection, staff turnover and the relationship with Forestry England who run the site.



## Organisational structure

Day-to-day responsibility for operations of The Friends is delegated to the full-time employed Chief Executive Officer (CEO) and, through them, to the staff team. The Friends is committed to good governance: during 2020 a governance review was performed to ensure maintenance of good standards of practice and further reviews will be held periodically going forwards. The Friends is also a fully paid member of the Fundraising Regulator and is committed to good practice in fundraising.

The Board works closely with the CEO to set the strategic direction of The Friends, as well as working with key stakeholders such as Forestry England. This has been demonstrated through the Joint Working Panel and, going forward, the Joint Steering Board attended by senior The Friends staff and senior Forestry England staff. The Director of the arboretum (employed by Forestry England) attends the Board meetings as a guest to report on performance and developments of the arboretum on a quarterly basis.

## Related parties

Forestry England is the site manager of the arboretum and the major beneficiary of our grant giving. To this end, The Friends has in place a partnership agreement that is signed off by the Board of Trustees and FE senior management. We have a grant policy in place with a transparent process for application and awarding of grants against our charitable objectives and criteria set in the policy. In awarding grants, the recipient (including Forestry England) is bound by the terms of those grants to provide impact reporting and we monitor the completion of projects against these terms.

## Pay policy for key management staff

The Trustees consider that the Board of Trustees, the Chief Executive Officer and the Senior Management comprise the Key Management personnel of the Charity in charge of directing and controlling, running and operating on a day-to-day basis. All Trustees give their time freely and no Trustee received remuneration or other benefit from their work in the year. Details of Trustees' expenses are disclosed in note 11 to the accounts.

The pay for the Chief Executive Officer and all staff are reviewed by the Board of Trustees annually. The pay review includes a third party benchmarking against both the voluntary sector and visitor attractions. Consideration is also given to staff performance during the pay review and adjusted as appropriate.

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# Aims, objectives & activities

## Objectives

The Friends of Westonbirt Arboretum aims to further public enjoyment and knowledge of the arboretum's world-renowned tree collection and to secure its sustainable future. It does this by engaging, informing and increasing its membership and also by giving financial and practical support to the management and development of Westonbirt, The National Arboretum and, in particular, by:

- ✿ providing support to the National Arboretum at Westonbirt in promoting public understanding of the critical role of trees to the environment and society;
- ✿ providing support for the arboretum's research and education in all fields relating to trees;
- ✿ providing support for the conservation, maintenance and development of the unique tree collection and historic landscape for future generations;
- ✿ providing funds to enhance the public's experience at the arboretum;
- ✿ acting as an advocate for the arboretum, promoting its values and the need for continuing funding;
- ✿ providing support to the arboretum by cultivating the Charity's relationship with its members so as to encourage long-term relationships and fundraising opportunities;
- ✿ promoting opportunities for access and participation to a diverse range of public individuals and groups; and
- ✿ providing funds for such other charitable purposes as will further the work of the arboretum.









## Strategies

In December 2019, a new vision for the arboretum as a whole was launched by Forestry England entitled 'Our Place in a Changing World', which focuses on responding to the environmental and human challenges we face over the next 10 years as the climate and society changes. The vision is for the arboretum to be ***A world leader in trees, inspiring people through conservation, education and participation.***

2020 saw The Friends begin delivery of its 3-year strategy, focusing on the following priorities with the overall aim of supporting the arboretum and this shared Ten-Year Vision, as detailed below:

-  contributing to the Arboretum Development Masterplan;
-  helping to deliver Arboretum Development projects;
-  improving the supporter journey; and
-  increasing stakeholder engagement.

Progress against this strategy has been positive for The Friends, despite it running through the time period and upheaval of Covid pandemic, staff changes, in both The Friends and Forestry England, and an economic and fuel crisis in the UK. Forestry England's Masterplan of developments for the site continues to evolve and emerge and during 2023 we have funded some exciting projects and developments relating to this plan and further details of this funding are provided in subsequent sections of this report.

With the establishment of The Friends' new Chair and Board members, the CEO, Finance Director, and the staff team resource and time has been focussed on reviewing our operations to ensure we are efficient and effective in all areas of the charity - which is particularly pertinent during the economic crisis our country is currently facing. The Board and staff have spent time revisiting the Charity purpose and reviewing the effectiveness and impact achieved to date. This work has been carried out in consultation with the Board of Trustees, all staff at The Friends and through stakeholder engagement, including our partners at Forestry England and Members via a members' survey. The Friends enhanced its fundraising capability during 2023 to enable on-site developments to come to fruition, alongside Forestry England's own investment in the site, as key development projects have taken shape.



The latter part of 2023 enabled us opportunity to reflect on this progress and, as the newly appointed Board and staff establish themselves, fresh ideas and approaches will inform the development of The Friends' strategy for 2024 and beyond.

### **Public benefit**

The Charity provides several public benefits, primarily focused on supporting the arboretum itself. This is made possible through fundraising and generating income through membership, with this income we support, enable and facilitate the following, primarily through our strong partnership and collaboration with Forestry England who manage the site.

**Conservation and Preservation:** The Charity contributes to the conservation and preservation efforts of Westonbirt Arboretum, ensuring that the diverse collection of trees and plants are maintained for future generations to enjoy.

**Education and Outreach:** The Charity payment to Forestry England for Members to access the site contributes to the running cost of the educational programmes, workshops, and guided tours to schools and the public, promoting environmental awareness and appreciation for nature.

**Access and Enjoyment:** The Charity works to improve access to the arboretum, making it more enjoyable and accessible for visitors of all ages and abilities.

**Research and Development:** Funding from the Charity supports research initiatives aimed at better understanding tree species, ecosystems, and environmental sustainability, seed collection and conservation efforts.

### **Community Engagement**

The Charity supports through grants the facilitation of community events, volunteer opportunities, and membership engagement, fostering a sense of belonging and stewardship among supporters of both the Charity itself and Forestry England, Westonbirt.

Overall, the Charity plays a crucial role in enhancing the arboretum's value as a public resource, both ecologically and recreationally.











# Achievements & performance

During the year, The Friends' main activities fell into the following areas:

1. Membership
2. Arboretum Access Rights Payment (AARP)
3. Fundraising
4. Grant giving
5. Retail

## Membership

As a membership organisation, The Friends relies on the lifeblood of our membership income, enabling us to raise charitable funds to meet our charitable objectives in support of Westonbirt Arboretum. Increase in membership numbers directly impacts the level of Arboretum Access Rights Payments The Friends makes to the arboretum: greater membership numbers result in a greater level of financial support for the arboretum through further grant giving.

The Supporter Engagement and Servicing Team has focussed on improving Westonbirt's supporter journey by encouraging regular visits to the site through marketing initiatives, tactics, and incentives. Members receive comprehensive membership benefits whilst sitting inside the permissible Gift Aid threshold, such as shopping discounts with partner organisations and entry to partner gardens, newsletters and 'behind the scenes' updates.





Members have played a vital role in The Friends since it was established in 1985 and continue to be pivotal in enabling the Charity to support the arboretum and secure its sustainable future for generations to come. We are truly grateful for their ongoing loyalty and support, which not only allows us to support the maintenance of the arboretum on a regular basis, but also to provide support for an ambitious vision which will secure the future sustainability of the arboretum.

By the end of 2023, we had 36,418 members, and 73% of those memberships were eligible for Gift Aid.

This resulted in membership income of £1,436,608 (including Gift Aid).

*"I've been a member of Westonbirt for many years now. I think originally because I enjoyed the calm and peace I felt whilst there. In the last few years, I've grown fascinated by the life of trees. How they communicate, how they provide a home to so many species even after they die. And of course, how much we as humans depend on them to survive. They are doing vital work and need our support to continue doing it."*

*"My personal journey with Westonbirt is woven with memories of exploration, learning, and finding peace in nature's embrace. It's a place that has shaped my love for the environment and the importance of preserving these precious natural spaces."*

*"Westonbirt holds many special memories for me and as a result of the excellent customer service I purchased a Christmas Gifted membership for my family member today – thank you"*



## Arboretum Access Rights Payment (the AARP)

The AARP is the payment The Friends makes to Forestry England, the site managers, to secure access for Members. This money is then incorporated into the site's income and goes towards Forestry England's operational management of the site. This includes:

- ✿ conservation and tree management work including collection and landscape management, propagation activity, dendrology, survey and inventory work, and volunteer, student and work experience;
- ✿ education, learning and interpretation, including enabling schools to use the arboretum to support the learning of their pupils and supporting visitors' understanding of the importance of trees in general, and Westonbirt in particular, as well as widening access from underrepresented audiences;
- ✿ volunteer participation support; and
- ✿ improving accessibility to the arboretum, including the funding and maintenance of mobility scooters.

The 2023 AARP was £718,718.

## Fundraising

Fundraising in 2023 has comprised a mixed income portfolio of individual donations and grants from trusts and foundations. During the year we received £175k of income from external trust and grant foundations and £56k from individuals through various forms of donations.

## Silk Wood Community Planting Project

The Silk Wood Community Planting Project has been a major fundraising focus of our joint activities.

During the year we raised £156,637 through trust and grant fundraising. This was further supplemented by Forestry England's own fundraising efforts.

## Acknowledgement of support

We, and the Westonbirt FE team, are extremely grateful to the following funders for their support via grants in 2023:

- |                              |                                 |
|------------------------------|---------------------------------|
| ✿ John Horseman Trust        | ✿ MillerKnoll Foundation        |
| ✿ Swire Charitable Trust     | ✿ D'Oyly Carte Charitable Trust |
| ✿ Garfield Weston Foundation | ✿ Gloucestershire Funders       |





*"This project is an ambitious three-year endeavour to not just restore the woodland, but to transform it into a vibrant "Community Woodland" – a living testament to collaboration and environmental stewardship. Hundreds of passionate individuals are joining forces with the dedicated team at Westonbirt. Together, they'll embark on a journey of shared purpose: designing the future of the forest, clearing the ground, and meticulously planting 9,000 carefully chosen saplings.*

*Over 20 resilient tree species will be woven into the landscape, creating a tapestry of biodiversity and strength. This includes a mixed of our well-known native tree species but also some non-natives chosen for their resilience to harsher extremes in weather, temperature changes or anticipated pest and disease threats.*

*This isn't just about planting trees; it's about building a legacy. A legacy of community, of environmental responsibility, and of hope for a greener future."*

**Silk Wood Community Planting Project – Forestry England**



## Grants awarded and paid

During 2023, we received impact reports for grants that had been awarded in previous years and projects that came to an end during the year. A number of these projects had experienced some delays due to Covid and resourcing, however, progress has been made toward completion and the majority are now finalised or close to completion. More details of these projects can be found on our website: [www.fowa.org.uk/our-cause/what-we-do/projects/](http://www.fowa.org.uk/our-cause/what-we-do/projects/)

During 2023 The Friends paid out a total of **£254,753** in relation to **previously awarded grants**.



### Oct 2018 Community Shelter and Green Wood Working Shelter (sum awarded - £58,845)

The Community Shelter was an exciting programme that built, in partnership with the community groups who now use it, a beautifully designed timber framed structure using timber from the arboretum in Silk Wood. The Friends had previously agreed to provide a grant of £59k. The aim of the Community Shelter is to host a bespoke programme of events and activities to give disadvantaged and excluded individuals the opportunity to participate in coppicing, green woodworking, bush crafts, arts and crafts and learning to use the cob oven. [www.fowa.org.uk/community-shelter](http://www.fowa.org.uk/community-shelter)

During 2023, the Green Wood Working Shelter element of this grant was completed: [www.fowa.org.uk/green-woodworking-shelter](http://www.fowa.org.uk/green-woodworking-shelter)





### Oct 2018 Coppice Shelter and Composting Toilet (**sum awarded £49,000**)

The budget for the Coppice Shelter was developed in 2018 but completion was delayed by COVID and staff shortages. Significant construction progress was made in 2022 with the work being completed in January 2023.

[www.fowa.org.uk/coppice-shelter](http://www.fowa.org.uk/coppice-shelter)



### Jan 2021 Quarantine House (**sum awarded £62,000**)

The Quarantine House was completed in early 2023 with the first plant material going into quarantine in spring of that year.

[www.fowa.org.uk/quarantine-house](http://www.fowa.org.uk/quarantine-house)



### Jan 2019 Arboretum Access Improvements (**sum awarded £305,489**)

The Friends had previously confirmed its funding support for this ambitious project that consisted of three main elements: signage, car park landscaping and footpath improvements. Some of this work was delayed due to Covid and the final part of the project concluded in 2023 which was car park landscaping and heritage fencing installation.

### July 2022 Silk Wood Project Manager (**sum awarded - £82,500**)



The Friends awarded salary costs for 1 year 11 months, including employers costs for pension, NI and other salary levies for the employment of a Project Manager to plan and initiate the Community replanting programme, ([www.fowa.org.uk/our-cause/what-we-do/our-work/silk-wood-community-planting/](http://www.fowa.org.uk/our-cause/what-we-do/our-work/silk-wood-community-planting/)) in addition a portion of this grant was used to contract a freelance bid writer to support trust and grant fundraising for this project. The project manager was appointed in January 2023.

[www.fowa.org.uk/blog/new-silk-wood-project-manager](http://www.fowa.org.uk/blog/new-silk-wood-project-manager)

### Dec 2022 Westonbirt Community Coordinator (**sum awarded £73,000**)

This grant was awarded to fund the appointment of a Forestry England employed Community Co-ordinator over 2 years to March 2025. The post holder will co-curate/develop activities in response to the specific needs of the individuals and community groups they work with. This will ensure the best outcomes for the participants, many of whom have complex needs. The Community Shelter providing a great space for engagement and a hub for activity in the woodland.

### Dec 2022 Westonbirt Interpretation Projects (**sum awarded £10,000**)

A grant was awarded to Forestry England to update on site interpretation to support the vision in strengthening the connection between visitors and trees. The funding has been used to design and purchase tree plinths to highlight 40 key specimens. The grant will be complete in April 2024.



*"The Community Coordinator in January 2023. With a team of 22 dedicated volunteers, the programme continues to work with a diverse range of groups to support participants' positive mental health and wellbeing, enabling them to connect with nature and enjoy the fantastic, therapeutic benefits that Westonbirt has to offer.*

*In 2023 just under 800 people visited as part of the 'led programme' and a further 1,527 people came on group self-led visits through the Community Access Scheme. (The Community Access Scheme allows visitors who would otherwise face barriers to visiting the arboretum independently, to enjoy all the wellbeing and mental health benefits at a reduced rate.)*

*The Community Shelter, and new Green Woodworking Shelter, are the setting for most of the Community Programme activities, including our Wild Westonbirt youth group. Through activities such as practical conservation tasks, woodland crafts, wildlife watching and campfire cook-ups, 14 – 18- year-olds gain confidence and make friends, whilst boosting their mental health and wellbeing".*

### **Feedback from Forestry England**





*"It was an amazing experience and I learnt so many new skills. I enjoyed the meals we had, being there to see the new growth in the coppice area and seeing how we have made a difference to the community shelter was really great. Also thank you so much for being my DofE [Duke of Edinburgh] assessor and helping me complete my volunteering section of the award".*

**Wild Westonbirt participant**





## Dec 2022 Westonbirt Tree Conservation Manager (**sum awarded £180,000**)

The Friends has funded the 3-year appointment of a Forestry England employed Tree Conservation Officer, whose appointment started in April 2023, and to contribute to the cost of associated tree research trips and seed collections.



*"As highlighted in the State of the World's Trees, published by Botanic Gardens Conservation International (BGCI) in September 2021, 30% of the world's tree species are threatened with extinction in the wild. To scale-up tree conservation, in partnership with Forestry England and multiple other institutions, BGCI is establishing a suite of Global Conservation Consortia (GCC), to address the conservation needs of highly threatened tree groups. Consortia established so far include groups of great significance to Forestry England tree collections: maples, oaks, magnolias and rhododendrons. Additionally, the GCC work*

*closely with the International Conifer Conservation Programme (ICCP), led by the Royal Botanic Garden Edinburgh (RBGE), and Bedgebury National Pinetum is a very significant contributor. Through these partnership projects, the Westonbirt Tree Conservation Manager will be establishing and developing international contacts with institutions and people contributing to the project, strengthening Westonbirt's role as a National Arboretum collaborating on a global platform. In addition to this global work, the Tree Conservation Manager will also establish and develop a Sorbus conservation consortia led by Westonbirt in partnership with National Botanic Gardens Wales. Propagation of endangered trees at the arboretum (some for sharing with other institutions) and the planting of new specimens of endangered species in the arboretum".*

**Mark Ballard Forestry England  
Arboretum Curator**

## Nov 2022 Coppice Apprentice (**sum awarded £5,292**)

The Friends agreed to help meet some of the costs of a Coppice Apprentice in 2022, over a 2-year period. This grant is to provide tools and training costs/top-up to the salary of a Coppice Apprentice, over a two-year period, who has been recruited through the Small Woodlands Association Apprentice Scheme. From January 2023, she has worked on the Westonbirt Coppice Restoration Project. The Coppice Restoration Programme is virtually unique in the UK and provides an important opportunity to educate the public on the benefits of woodland management. The coppice workers frequently interact informally with members of the public and more formally with visiting Groups.



### July 2022 Trainee-Student Arborist 2023-2025 (**sum awarded £65,000**)

The Friends has again funded a 3-year programme offering a trainee student arborist a Forestry England fixed term contract (51 weeks), to work with the Westonbirt Arboretum Tree Team. The grant allows for funding of 2 further placements in Year 2: 2024-25 and Year 3: 2025-26. The Trainee/Student Arborist placement is an opportunity for young people studying arboriculture, forestry, horticulture or a related subject to gain practical industry experience within a world-class tree collection. This initiative has been praised by several educational institutions as being a key factor in student personal development and ultimate success. The Trainee/Student Arborist not only assists the Forestry England, Westonbirt Tree Team each year with the essential conservation, maintenance and development of the living tree collection and historic landscape, but it enables new entrants into the field of arboriculture to learn key skills and adopt the highest industry standards, at a time when trees and woodlands have never been more important. The Friends is proud to be supporting the development of the workforce trained in the specialist skills required for looking after the nationally important tree collection, here at Westonbirt.

### June 2022 University of the West of England PhD Student (**sum awarded £25,000**)



The Friends awarded a grant of up to £25,000 across four years to part-fund a PhD research project. This is a collaboration with the University of West England (UWE) with 25% funding from The Friends, the residual 75% funded by UWE. The research builds on work carried out at the arboretum in 2020-21 by a UWE MSc student and will provide an in-depth survey of the current and potential future threats to Tilia in the UK. The research aims to improve our understanding of the health of an important parkland tree species, and the partnership strengthens the

link between academic institutions and Westonbirt, the National Arboretum. The grant is ongoing up to 4 years.

[www.fowa.org.uk/tilia](http://www.fowa.org.uk/tilia)

### Nov 2022 Mobility Scooters (sum awarded £6,200) and Off-Road Mobility Scooter (**sum awarded £4,995**)

The Charity is keen to ensure that the site is accessible to as many people as possible. A fleet of 10 mobility scooters are available for Arboretum visitors to hire free of charge, but many of them were more than 10 years old and were becoming increasingly unreliable and maintenance costs untenable. The Friends has, therefore, supported the replacement of the two scooters, and funded the purchase of an off-road mobility scooter for use by Forestry England's volunteers and community groups to enable better access to all areas of the arboretum beyond the capability of the visitor fleet of mobility scooters. The grant was completed in Jan 2023.



## New grants awarded in 2023

In 2023, The Friends paid out a total of £226,118 in relation to new grants awarded in the year. The details relating to these grants are provided below:

### Jan 2023 Westonbirt Play Project (sum awarded £187,500)

The Friends awarded a multi-year grant to fund the development of the provision of Play at Westonbirt Arboretum. Including a small contribution toward trust and grant fundraiser time to secure further funding for the project. During 2023, we have paid out £9,600 of this grant which financed towards consultancy costs. We continue to fundraise externally towards this longer-term project to develop play at Westonbirt Arboretum.

### Jan 2023 Visitor Shuttle Bus Over (sum awarded £26,000)

The Friends awarded a grant to enable Forestry England to purchase a new visitor shuttle bus - enabling a more reliable service, taking visitors deeper into the arboretum and to be weather proofed. The shuttle bus is designed not only for use by those with access needs but has space for groups to travel together, it is safer to drive so enabling more volunteers to provide a reliable bus service on site. This bus was due to be purchased and in place by Autumn 2023, subject to procurement, unfortunately there have been delays so it is now expected to be in place by Easter 2024.

### June 2023 Pricing Strategy (£6,250)

The Friends funded an external consultancy to provide industry analysis and benchmarking to inform a Forestry England pricing strategy, to cover membership and day admission to help inform The Friends and Forestry England management decisions. The consultancy advice has helped underpin both The Friends' and Forestry England's commercial strategy and aid our partnership by achieving a clearer understanding of how admission and membership prices should relate to each other, what we can do to optimise income, number of entries, supporter journey and engagement with onsite case for support, and Forestry England's other objectives such as reducing arrivals by car.

### Oct 2023 Roadside and What's On Today Signage (£6,730)

The Friends awarded this grant to Forestry England to provide an externally facing roadside sign-frame to promote arboretum activities and membership to passers-by on A433, replacing a sign that was removed approx. 3 years ago due to structural decay. In addition to this, a 'What's on Today' ladder board to be placed outside the Welcome Building and visible to visitors immediately upon entering the arboretum. This facility has not been provided before and there is significant demand for it as identified through the Access Audit completed on site by Inclusion Gloucestershire, aiming to make the site more accessible and user friendly especially to those with access needs.



### **Oct 2023 Scooter & Wheelchair (£5,230)**

The Friends awarded this grant to Forestry England to replenish the Mobility Scooter and Wheelchairs for hire at the Welcome Building to improve access, as the arboretum becomes more well known for its accessible paths, demand for these resources is often outstripping supply so we aim to continue to fundraise further to meet this need.

### **Oct 2023 Welcome Building Member Card Scanning App (£5,450)**

The Friends awarded this grant to Forestry England to improve member data collection through scanning of membership cards at entry and providing the data for analysis by our membership team.

### **The Friends Community Grant Giving Fund (£25,000)**

The Friends Community Grant Giving Fund is designed to enable individuals, and particularly those who would otherwise struggle to access the site, to be able to afford the costs of entry, travel and refreshments, as well as engagement in Forestry England activities.

### **Aug 2023 Wild Wonder Access tickets £380**

The Friends awarded this grant to community groups and organisations free entry tickets, transport costs and a book voucher providing a free book for each child attending the children's literature festival.

[www.fowa.org.uk/wild-wonder](http://www.fowa.org.uk/wild-wonder)

## **Retail**

We appointed a new Buying and Retail Manager in October who has continued to develop the variety of products available, purchasing from artisan makers and, where possible, from local suppliers as well as increasing the amount of Westonbirt-own produce and merchandise. Overall, The Friends has sought to follow an ethical approach in its buying strategy, sourcing British produce and merchandise locally whenever possible.

The previous year was a challenging time for retail however, during 2023 a range of actions were implemented to address improvement of the shop turnover, development of products available and marketing. We also had significant support from Forestry England who in 2023 temporarily reduced the rent charge while we addressed improvements. As a result of this combination of efforts we have seen an improvement in shop performance in late 2023 and we are positive that with the improved systems and more favourable lease terms, we will see a further improvement in performance in 2024. With The Friends running the retail, we are able to provide Forestry England with an onsite shop that reflects the arboretum well and provides the Charity with profits to then award as grants to Forestry England and others in support of the arboretum.









# Priorities for 2024 - looking ahead

During 2024, we plan to continue to focus on building our partnership and collaboration with Forestry England staff to deliver the best possible outcomes for the arboretum. In addition to this, we will continue to ensure we are operating as efficiently and effectively as we can as a charity. Joint planning for the future enables The Friends to target its activities on having the best possible outcomes for the site through our grant making activity and efforts through fundraising. We will also continue to focus on providing a positive visitor experience through the development of the retail offer which will not only enable us to redirect profits from retail toward the site's development but also provides an opportunity to promote the Charity and its impact and engage with Members or encourage new membership sign up.

The Board has experienced a period of refresh as three long-standing Trustees retired or stepped down during the year. The focus going forwards into 2024 will be a review of governance policy and procedures and development of the 3-year strategy that will see us into 2025 and beyond.

During 2024, we intend to refocus our attention on the key charitable objective of fundraising and membership growth and retention so as to achieve our primary objectives: preserve, develop and provide access to the arboretum. We will do this by developing a marketing strategy that will include new initiatives to retain Members' engagement and also to acquire new Members as well as concentrate efforts on providing a high-quality membership service that is supported by efficient





IT systems. We will also continue to develop our fundraising efforts and, in turn, undertake grant giving (to the community and Forestry England). Supporting the exciting development projects being delivered by Forestry England, presents an opportunity to grow our profile and fundraising capability, ensuring we can maximise our impact as a Charity on the sustainability and development of the beautiful site that is Westonbirt Arboretum and its globally important tree collection.

We are grateful to all those individuals and organisations that have supported our work through financial and in-kind support. These include individual donors, charitable trusts and grant-making organisations and others who offer support through their expertise or services.

### **Westonbirt Forestry England Volunteers supporting The Friends of Westonbirt Arboretum (The Friends)**

The volunteers at Westonbirt are managed by Forestry England and they have a team of over 280 dedicated volunteers who provide essential contributions to the site. The Friends is extremely grateful to be able to work with Forestry England and their volunteers to promote the Charity, membership and fundraising on site. The Friends works in close partnership with the Welcome Building volunteers and Tree Guides in particular, who support the Charity by promoting membership and further giving opportunities to day visitors and Members alike and provide sign-up support for those taking up membership.

The Friends Supporter Services Team continue to work closely with Forestry England's Visitor Services team to keep the volunteers up to date by providing regular training and eNews. This ensures they have the information needed to support The Friends' work. The Charity is grateful for everything volunteers do in support of The Friends' activities and membership sales, and for the exceptional management and training provided to volunteers by the onsite Forestry England team.



## Our Patron and Ambassador

The Friends of Westonbirt Arboretum are privileged to continue to enjoy the support of our Royal Patron HM The Queen and our Ambassador the Honourable Beth Rothschild. We are most grateful for your ongoing commitment.

## Prior year adjustment

It was necessary to process prior year adjustments in respect of two different matters arising from the treatment of agreed grant commitments and from the calculation of VAT on membership income.

Grant commitments: previously expenditure relating to agreed grants was ring-fenced through the use of designated funds and grant expenditure was only recognised as a cost at the point that the grant was paid out. Following a change of auditor, the Charity has been advised that in compliance with approved accounting standards, grants should be recognised as a cost at the time of commitment, rather than at the time of payment. As such the classification of grant commitments has altered from forming part of the designated funds, appearing below the line, to creditors, forming part of the Charity's liabilities above the line. Further details relating to the prior year adjustments resulting from this change in the treatment of grant commitments can be found in note 2 of these accounts.

VAT on membership income: membership income is a mixed supply for the purposes of value added tax. As such, the VAT rate applied to membership income is a calculated rate, not a standard rate. Following advice from HMRC, it was necessary for the Charity to amend the basis on which it calculated the VAT rate to be applied to membership income. It was necessary to apply this adjustment to a retrospective period going back to the start of 2020, therefore, this adjustment has an impact on previous years and has been processed through these accounts as a prior year adjustment. At the time of completing these accounts, a submission has been made to HMRC in relation to the additional VAT due but no response has yet been received from HMRC so potential interest and penalty charges have been included as estimated figures. Further details relating to the prior year adjustments resulting from this adjustment can be found in note 2 of these accounts.

## Investments

### Investment policy

The Charity's investment policy is reviewed from time to time and amended when necessary. The investment policy in place during 2022 was conservative, limiting investments to deposits with high quality counterparties and investments in CCLA's money market fund. The Trustees reviewed the policy during the year and, in light of the current economic and political climate, have considered that continuing to adopt this investment policy remains appropriate.







# Finance overview of income & expenditure

By the end of 2023, we had 36,418 members, and 73% of those memberships were eligible for Gift Aid. This resulted in membership income of £1.4m (including Gift Aid).

The 2023 Arboretum Access Rights Payment was £718k.

During the year we received £175k of income from external trust and grant foundations and £56k from individuals through various forms of donations.

During 2023 The Friends paid out a total of £291k in relation to previously awarded grants.

In 2023, The Friends awarded a total of £226k in relation to new grants in the year.

For full details please find our latest financial accounts on the Charity Commission website:

<https://register-of-charities.charitycommission.gov.uk/charity-search/-/charity-details/293190/accounts-and-annual-returns>









the friends  
of Westonbirt  
Arboretum  
Registered Charity 293190

Connecting people  
with trees to improve  
quality of life



[fowa.org.uk](https://fowa.org.uk)

