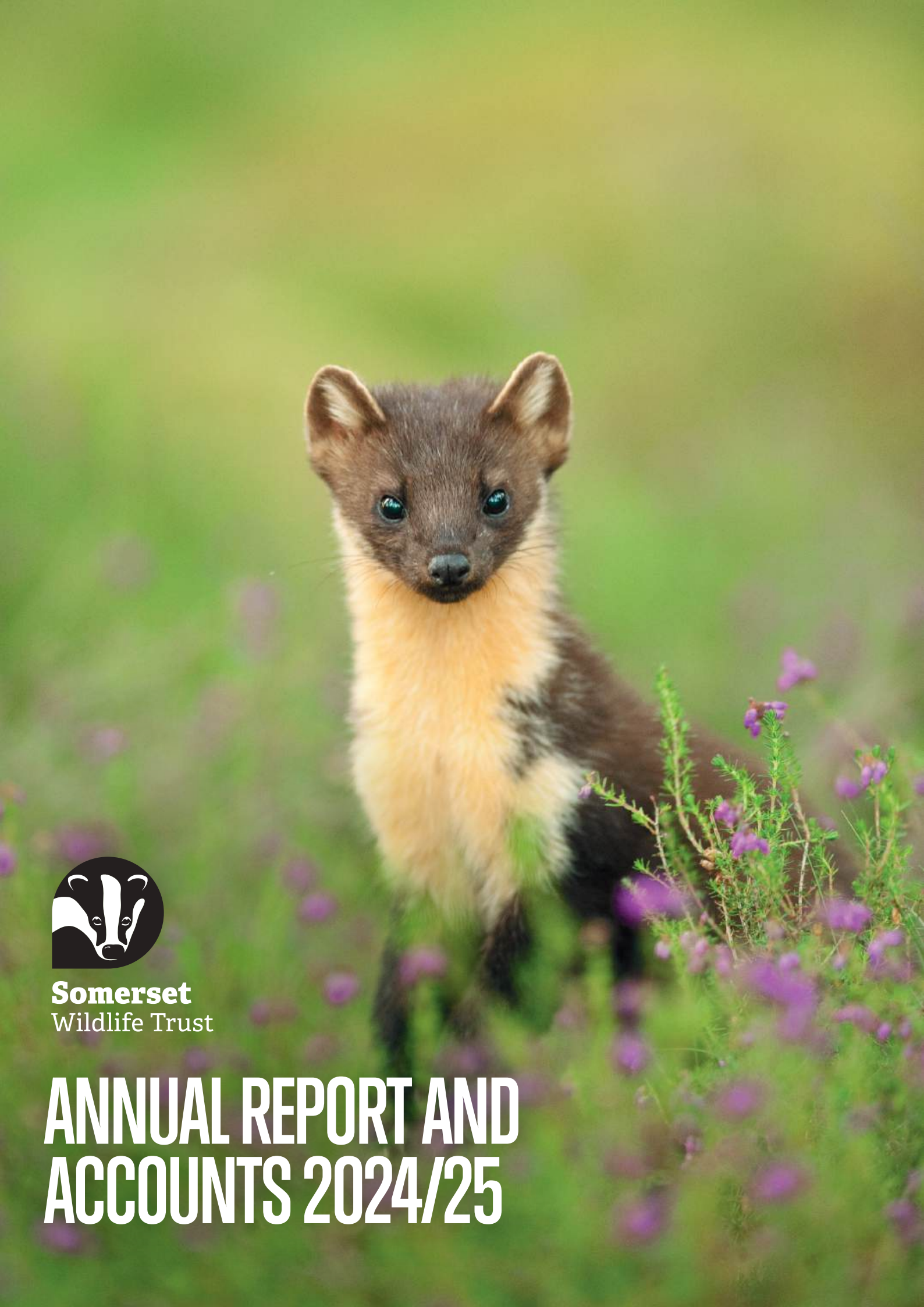




Somerset
Wildlife Trust

ANNUAL REPORT AND ACCOUNTS 2024/25



THANK YOU

There's no doubt that this year has been another challenging one; for the Trust, for nature, wildlife and for us as individuals as we see the growing human impact on some of the country's most precious sites for nature, and legislative policy that seems set on contributing to accelerating the pace.

However we have taken solace in the fact that the force of nature is strong, as is the indomitable power and passion of the over 23,000 members and thousands of other supporters across the county that have joined forces with us this year as we fight to stand up for nature in all the ways we can; from volunteering, fundraising, monitoring species and campaigning to being advocates in our amazing, vibrant communities, from the Mendips Hills to the Somerset Levels and Moors, to our brilliant coast and the urban streets of Taunton.

Thank you for being with us and on nature's side.

Somerset Wildlife Trust is a registered charity.

Charity number 238372.

Company number 818162.

Registered office:

34 Wellington Road, Taunton,
Somerset TA1 5AW

Created by **Kirby Everett**

Kirby.Everett@somersetwildlife.org

Designed by **Tina Hobson**

tinahobson.com

CONTENTS

Part 1 Introduction	4
Introduction from our Chair	6
Message from our CEO	8
Part 2 Our strategy	10
Our approach and shared values	12
Wilder Somerset 2030	13
Transformations we are making	14
Impacts we are committed to achieve	16
Part 3 Strategic report	18
How we raised and spent our money	20
Goal 1 More space for nature	22
Goal 2 A movement for nature	30
Goal 3 Telling Somerset's story	38
Our people and organisation	46
Developing Somerset Wildlife Trust	48
Volunteers	52
Fundraising	54
Financial review	60
Objectives and activities	63
Structure, governance and management	66
Statement of trustees' responsibilities	73
Part 4 Independent auditor's report	74
Part 5 Financial Statements	80
Consolidated statement of financial activities	82
Consolidated and trust balance sheets	83
Consolidated statement of cash flows	84
Notes forming part of the financial statements	86
Gifts and donations	102
Key people and advisors	104



PART 1:



Introduction

- ▶ Introduction from our Chair
- ▶ Message from our CEO







INTRODUCTION FROM OUR CHAIR



“Looking to the future”

Using the word ‘rewilding’ or ‘wilding’ in any conversation sparks strong emotions and varied perspectives. For some, it conjures an idealised past, while for others, it suggests a pristine wilderness untouched by humans. But for me rewilding, or wilding, whichever word you use, is about creating resilient, functioning ecosystems fit for the future. Ecosystems that will sustain both wildlife and people in equal measure, and in harmony with each other’s needs. Nature needs us and we need nature. We are part of nature – we simply mustn’t forget that.

Take our river systems, for example. When healthy, they adapt naturally to seasonal floods and droughts, provide connected habitats, and foster thriving populations of fish, insects, amphibians,

and aquatic plants. While addressing pollution is crucial, many of our rivers still lack a vital component—a keystone species that plays a transformative role in maintaining ecological balance.

That missing ‘ecosystem engineer’ is the beaver. These remarkable animals improve water quality by trapping sediments and pollutants, regulate water flow to prevent floods and droughts, create wetlands that support a diversity of wildlife, and boost fish populations by offering shelter for juveniles and deeper, cooler waters for species like salmon and trout.

I’m so excited that beavers are now returning to Somerset and key rivers across the county, and that we now have legislation to ensure they can continue to thrive and can be supported in the right



way in our communities. Already, we're seeing the benefits as they shape and restore the natural balance of the habitats in which they can be found.

And in a similar way, we now have pine marten present in the south west, with the hope that we can put back the balance in our precious woodlands. Of course, challenges will arise, as they do with any species reintroduced into the landscape—but the solutions exist, and the ecological rewards far outweigh any obstacles.

It's not all about the new. Across the county we need to manage and enhance our habitats to function better with the species already present. Climate change is reshaping our world. We cannot go back, we must learn from our past to prepare for the future.

Somerset Wildlife Trust's vision is to ensure healthy, connected ecosystems across our county—from the Mendips and Tone Vale to the Somerset Levels and coast. To do this, we must think not just in terms of 5–10 years, but 50–100 years, taking a long-term, strategic view of how we support the land and the species within it.

At Somerset Wildlife Trust we have an exceptional team—ecologists, land advisers, reserves managers, reintroduction specialists, and communications experts—all working to engage communities and deliver real change. Our priority isn't just our own reserves; it's empowering farmers, landowners, and local groups to adopt sustainable practices that benefit the broader landscape.

None of this would be possible without our members, donors, and volunteers. Their passion for wildlife fuels everything we do. We understand the daunting scale of challenges facing nature—from land-use change and development to the escalating pressures of climate change. But if the return of species like the beaver has shown us anything, it's that positive change is possible and I believe should give us all real hope for the future.

A handwritten signature in black ink, appearing to read 'Rpt Taylor'.

Rupert Taylor

MESSAGE FROM OUR CEO



“Over the last year we have prioritised our own work to ensure we are as impactful as we can be”

While thinking about the last year and what we've achieved, I'm reminded of the Serenity Prayer “grant me the serenity to accept the things I cannot change, the courage to change the things I can, and the wisdom to know the difference”. At Somerset Wildlife Trust we've been putting our energy into the things we can change over the last year, accepting there is so much happening right now that we must absorb: changes politically, economically, and socially both in the UK and globally that are frustratingly beyond our control.

With the other 45 Wildlife Trusts and other environmental organisations we continue to challenge and try to improve national policy to reduce the negative impacts for nature. Our main focus is on things we can influence in Somerset. Over the last year we have prioritised our

own work to ensure we are as impactful as we can be. To help us do that, we made some changes to our organisational structure, taking on new Directors, who have made great strides in securing new opportunities and strategic partnerships that will help us scale up our ambitions and put pace behind our landscape-scale approach - including kickstarting a strategic approach to our work in the Tone Vale.

Our power is our people. It's important to us that we invest in them. We've been able to take meaningful steps towards the Trust becoming a more inclusive organisation for staff, volunteers and visitors and will continue this work next year.

Our focus on supporting individuals, communities, businesses and landowners to take action for nature is really beginning to show results as we better

understand the most meaningful, impactful actions that support nature's recovery. We've been busy delivering huge amounts of work for nature's recovery in Somerset too.

On our nature reserves and wilding sites, I'm proud of the achievements our teams have made, with the support of hundreds of volunteers; from peat restoration work on the Somerset Levels and Moors to dealing with the impacts of ash die back and encouraging woodland recovery on the Mendip Hills. We're seeing real changes at Honeygar, our wilding site, with many more species recorded by the vast number of volunteers and researchers monitoring the changes. What we are doing on this site is pioneering – from the way we are monitoring hydrology and measuring peat carbon stores to using cutting edge bio-acoustic technology and AI to track bird species across the site.



We've relaunched our consultancy to focus more on delivery of our strategic goals as well as generating much needed income for the charity.

We can't deliver nature's recovery without people and all of the Trust's teams have been working hard to engage and support communities across the whole county, from community-designed Climate Adaptation Plans, to large numbers of people getting involved in our Big Count citizen science project, from a wide consultation on beaver guidance, to our relaunched Private and Community Nature Reserves network. I'm delighted we've been able to support Somerset's young people through our Youth Forum – they have been incredibly active this year, attending a mass rally for nature in London, writing to MPs, working with our staff teams to bring their passion and perspective

to all that we do. We are working with communities across Somerset from Bridgwater to Glastonbury and from Frome to Taunton, finding ways to inspire, support and enable people to protect and improve their local nature.

We've engaged with outgoing and incoming MPs to make sure they have a full understanding of how policies impact nature in Somerset and continue to advocate for change where this is needed. Working with a range of partners we are advocating strongly for estuary ecosystem and species protection as Hinkley C comes into operation.

Our continued leadership of the Local Nature Partnership, which I currently Chair, has allowed us to agree shared goals for Somerset, including in the Local Nature Recovery Strategy. Together with environmental organisations, businesses, the council, statutory

agencies and academics, we have identified areas to focus on to increase our collective impact for nature and reach shared goals of 30% of land and sea managed for nature by 2030. There's a lot to do to achieve this, but we are on our way.

Some of the more worrying global and national trends may be beyond the sphere of our direct influence, but there is a huge amount we can do to turn the tide for nature's recovery here in Somerset with you on our side.

Together, we are not just protecting wildlife now — we are ensuring future generations get to experience a healthy and abundant natural world.



Georgia Dent



PART 2:

Our strategy

- ▶ Our approach
- ▶ Our shared values
- ▶ Wilder Somerset 2030
- ▶ Organisational transformations
- ▶ Impact measures



OUR APPROACH

Launched in 2021, and co-designed by trustees, staff, members and supporters, our Wilder Somerset 2030 strategy remains the lodestar for all that we do. This Annual Report sees us nearly at the halfway point of that strategy. While the general trend is negative for nature globally and in the UK, and the pressures on it remain and accelerate in pace, over this time we have also seen some really positive progress, and learned a great deal about where best to focus our efforts. We know that if we work together with our supporters, partners and wider nature stakeholders in the county, we can bring nature back. **Nature can't wait.**

OUR VISION

A Somerset-wide nature recovery network creating more space for wildlife, benefiting everyone and playing its part in helping us reverse biodiversity loss and tackle the climate crisis.

OUR MISSION

Working for the changes needed for nature and people to thrive together.

OUR SHARED VALUES

Somerset Wildlife Trust share the following fundamental values, which underpin all of our work and support our journey to a Wilder Somerset 2030.



1 We believe **everyone can make a contribution** to nature's recovery

2 We love **Somerset** - it's amazing wildlife and its communities

3 We are **confident and brave** in order to achieve the greatest impacts for nature

4 We encourage **innovative thinking and action** for nature's recovery

5 We are **passionate about nature**

WILDER SOMERSET 2030

GOAL 2 A MOVEMENT FOR NATURE



► Everyone has the opportunity to experience nature, with at least 1 in 4 people taking action for nature's recovery across Somerset as part of Team Wilder.

► Awareness of the environment is higher now than it has been for several generations, but our collective behaviours do not yet match our concern or the scale of the challenge.

► We will inspire more people to turn awareness into nature-positive behaviours and action - a critical mass that can tip the balance for nature's recovery. Value for nature comes from experiencing it, so connecting people to it and enabling them to share their experience with others is vital.

GOAL 1 MORE SPACE FOR NATURE



► Nature is improving everywhere with restored natural processes, connected and protected through a Nature Recovery Network, with at least 30% of land and sea managed positively for nature (30 by 30).

► Currently only 10% of the county can be classified in good natural or semi-natural condition with species-rich natural habitats supporting abundant and diverse wildlife.

► Tripling the land managed for nature is a challenge but we will buffer and connect our nature reserves to the wider landscape and work in partnership with our peers, partners, communities, farmers, landowners, and individuals to influence how land is managed across the county, ensuring it is with nature in mind.

GOAL 3 TELLING SOMERSET'S STORY



► The story of nature's recovery in Somerset is told through our interactive State of Nature tool that monitors progress and informs action.

► We need a clear understanding of what is happening to wildlife over time in terms of biodiversity and abundance so we can make clear decisions for nature's recovery, based on scientific data and evidence.

► We will monitor trends, fill the gaps in our species knowledge, and increase the number of records held by teaming innovative and meaningful data recording methodologies, with a strong programme of public citizen science opportunities and training. Nature needs more eyes on the ground.

TRANSFORMATIONS WE ARE MAKING

We have identified four key transformations that we believe will enable us to realise our strategic goals and achieve our strategy. These transformations form a continuous dynamic process that underpins our collective ability to achieve our vision of a thriving natural world.



INCLUSIVE, DIVERSE, LEARNING CULTURE

Staff and volunteers

EDI and values

Learning and development

We invest in our people, staff and volunteers, ensuring we have the skills and experience needed to achieve our goals and create opportunities for people to develop their careers and achieve their goals. We are relevant to and inclusive of all communities, we listen and learn from them and understand their needs and aim to speak with an authentic, credible voice.



INCOME STEP CHANGE

Financial model

Commercial income

Green finance

We will engage with more supporters who share our values and goals, from corporates to individuals, and diversify our income streams, including through innovation such as green finance, to ensure our core delivery model is funded through our unrestricted income. We will use project funding for time limited or innovative work. We will expand our commercial activities, identifying new opportunities and always setting high standards for environmental integrity and due diligence.





BEING A BOLD, AUTHENTIC VOICE

Embedding Team Wilder ethos
Communications and brand
Data, monitoring and reporting
Governance, policy and process

We are bold and confident speaking out for nature, backed by our members and supporters, with a strong brand and clear communications approach. We are not afraid to say we are part of nature and what nature needs to thrive. We invest in science, monitoring and research to be evidence-led in our delivery, advocacy and policy. We hold ourselves and others to account through the Somerset State of Nature. We use our knowledge, expertise and evidence to inform decision making in Somerset that impacts on the environment. We hold ourselves to the highest standards of governance, transparency and accountability.



LEADING AND INFLUENCING CHANGE

Maximise our main land assets
Acquisition and influence
Environmental impact
Digital transformation

Our direct contribution is only part of the solution to tackling the ecological and climate emergencies. To truly be effective we must support, influence and inspire others to take positive action and lead by example in our delivery including our own environmental impact. We manage existing and acquire new land to protect the precious and vulnerable species until the wider landscape improves and demonstrate how nature can recover sharing our learning with others. We test and trial innovative new approaches to land management including financing, to support other landowners. Our visitor strategy recognises the important role our land plans in connecting people with nature balanced with protecting vulnerable species and habitats. We invest in digital technologies to improve our efficiency, effectiveness and connect with people.





IMPACTS WE ARE COMMITTED TO ACHIEVE

Our three strategic goals guide all our work. To support our achievement of them we have defined the 8 primary impacts we want to have. We consider these to be the critical areas where we can - and must - make change happen. These will be a key focus during our mid term strategic review and delivery plan refresh (planned for

2025/6); they will also shape our future reporting to our Members and wider stakeholders.

We are committed to share clear and reliable reporting on the impact we are making. We know explaining and showing our progress on this is vital for engaging people and thus our ability to succeed across all our strategic goals.



Nature Improving Everywhere

Somerset Wildlife Trust advises and influences others on policy, planning and decision making to restore natural processes, connect habitats, and protect nature through a nature recovery network



Land Owned & Managed

Somerset Wildlife Trust's contribution, through land we own and influence, to the national and international target of 30% of land protected and positively managed for nature for at least 20 years



Access to Nature

Somerset Wildlife Trust creates accessible opportunities for a range of diverse audiences and supports partners to help more people engage with and value nature across Somerse



Building Support

Somerset Wildlife Trust is working with others to build support for nature's recovery across Somerset through advocacy and influencing change across sectors



Marine & Coasts

Somerset Wildlife Trust's contribution to the national and international target of 30% of sea protected and positively managed for nature for at least 20 years



Actions for Nature

Somerset Wildlife Trust is enabling people to take visible, meaningful action for nature in order to reach a social tipping point, a movement of people in Somerset driving positive change



Income

Somerset Wildlife Trust is growing its financial capacity to achieve a Wilder Somerset through a model that sustains core operations and enables strategic growth



State of Nature

Somerset Wildlife Trust gathers, collates, analyses, and reports data to understand nature's changes and guide recovery efforts and monitor our collective progress

PART 3:

Strategic report

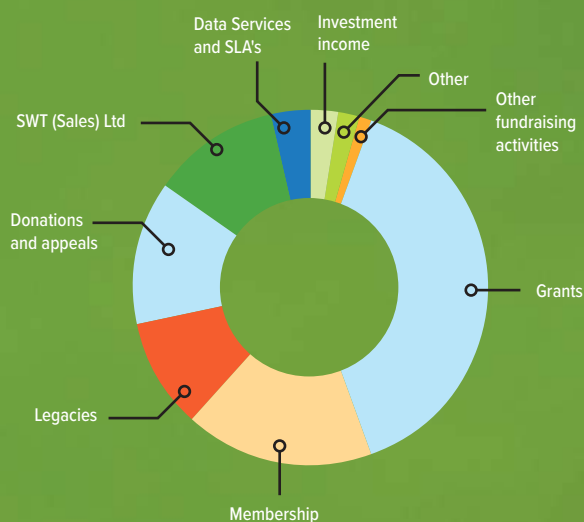
- ▶ How we raised and spent our money
- ▶ More space for nature
- ▶ A movement for nature
- ▶ Telling Somerset's story
- ▶ Our people and organisation
- ▶ Financial review



HOW WE RAISED AND SPENT OUR MONEY

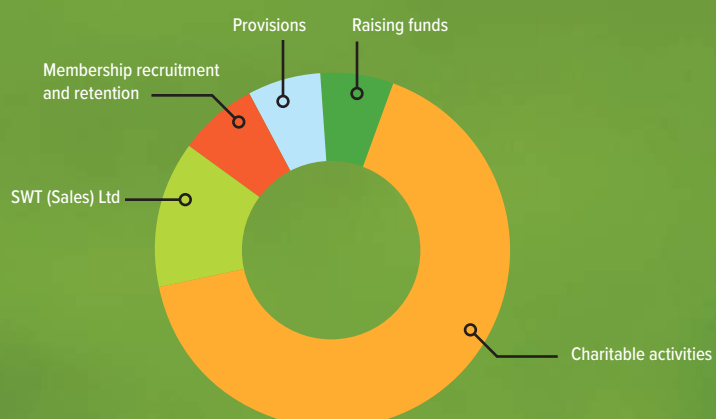


INCOME BY SOURCE



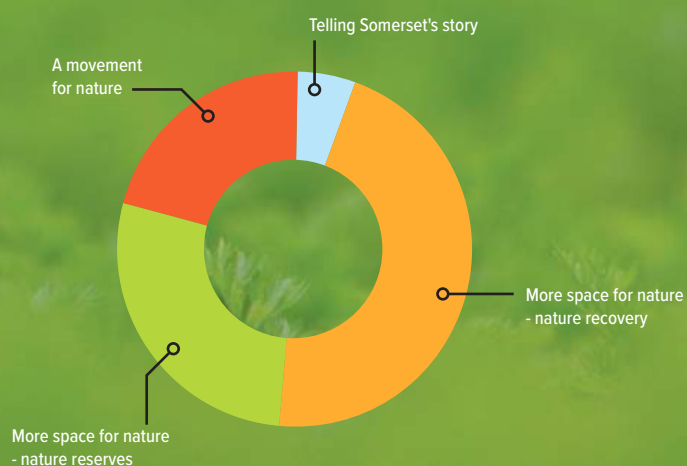
	2024-25 £'000	2023-24 £'000	Change %
Grants	2,085	1,652	26%
Membership	919	890	3%
Legacies	538	310	74%
Donations and appeals	702	875	-20%
SWT (Sales) Ltd	623	553	13%
Data Services and SLA's	195	198	-2%
Investment income	126	132	-5%
Other	106	214	-50%
Other fundraising activities	54	81	-33%
Total	5,348	4,905	9%

EXPENDITURE BY ACTIVITY



	2024-25 £'000	2023-24 £'000	Change %
Charitable activities	3,826	3,421	12%
SWT (Sales) Ltd	764	650	18%
Membership recruitment and retention	425	296	44%
Raising funds	382	334	14%
Provisions	376	-	100%
Total	5,773	4,701	23%

EXPENDITURE ON CHARITABLE ACTIVITIES



	2024-25 £'000	2023-24 £'000	Change %
More space for nature - nature recovery	1,756	1,297	35%
More space for nature - nature reserves	1,064	993	7%
A movement for nature	811	888	-9%
Telling Somerset's story - Somerset Environmental Records Centre	195	243	-20%
Total	3,826	3,421	12%



More space for nature

FACTS AND STATS

An estimated **11 million** tonnes of carbon is stored in the county's peat, equivalent to 10 years' worth of the county's emissions. Peat is still being extracted in Somerset.

Under **15%** of rivers in Somerset are in 'Good' ecological condition

5.74% reduction of grasslands in Somerset over the last 25 years.

Out of the 128 SSSI sites in Somerset, only **46** are in 100% favourable condition

Somerset's **73km** coastline is facing significant pressure

Over the last **30 years**, presence of invasive species in Somerset has increased by 260%.

(Source: Somerset State of Nature Report 2023)



The challenge

The primary threat to nature right now is the reduction in quality, quantity and connectivity of habitat (as identified by the Lawton Review 2010, IPBES 2019) due to a range of issues including development, agricultural policies, pollution, competing land use and invasive species.

Climate change is making this worse, and people in Somerset are already experiencing the impacts.

The government and Somerset Council have committed to restoring nature, with legally binding targets for nature and species recovery yet there is a huge funding gap, with changes in agri-environment schemes impacting all landowners, including the Trust.

Our approach

We are focusing our efforts where we believe we can achieve the greatest impact for nature's recovery in the face of a changing climate. Our reserves continue to represent the species-rich core of the county's nature network and can demonstrate to all what well managed habitat looks like. We are now refocussed on four priority landscapes and, working with other landowners, are working to identify how we can best connect them and form a more robust network across the county. We are working with and supporting communities to take positive action for nature that contributes to increasing connected space for wildlife.

What we aimed for

Working with and **supporting landowners** to manage their land for nature is crucial. Key to that has been continuing to develop the **land management and advice** we offer and providing effective consulting services to provide landowners with the information and support they need, whether through the charity or our consultancy. As well as supporting others, we know that strategic **land acquisition** needs to be a key part of our strategy; to buffer our reserves, connect high quality sites and fill gaps in the county's nature recovery network and ensure permanence for the species and habitats on these sites under our management. Doing both in conjunction with a strong **Local Nature Recovery Strategy** will enable us to make great gains for nature on a county level, so our continued work with Somerset Council this year was of critical importance.

OUR IMPACT IN NUMBERS

We have engaged with over
119 landowners covering
9450 hectares of
Somerset.

67 acres of land
purchased and ready
to improve for wildlife

20+ Strategic landscape
partners and
organisations
locally and nationally,
involving 3 protected
landscapes, 2 super
National Nature Reserves

This year our Mendip Farm
Cluster has grown to

44 members covering
an area of 6,600
hectares. This
equates to around 22%
of Mendip Hills National
Character Area





WHAT WE DID:

HOW TO MAKE FRIENDS AND INFLUENCE PEOPLE...ON THE MENDIP HILLS

Alongside our really successful Farm Facilitation work on the Mendip Hills, this year we have also been able to deliver a range of other land advisory work, creating strong and meaningful relationships with a variety of different landowners. We have been supporting them with advice and information on how they can manage their land and operations in a more wildlife-friendly way. We have been busy delivering site surveys and visits on an area of land that covers approximately 170 hectares, a positive sign that there are many who want to adapt but need specialist support to do so.

Much more was delivered in this priority landscape including; inputting into and reviewing the 5-year Biodiversity Management Plan for the landholding surrounding Holcim's Torr Works quarry; research undertaken to determine options for best practice habitat restoration/ grassland creation without the use of glyphosate for our Farm Cluster

members; facilitating the allocation of free trees to a number of Mendip landowners; and providing advice on funding including via agri-environment schemes, Biodiversity Net Gain, Woodland Trust, Farming in Protected Landscapes, Somerset Council and Forest of Avon Trust funding.

To improve the support we offer to landowners we have invested in training for our advisors. This includes specialist training in professional Sustainable Land Management qualifications to help ensure that we are up to date in terms of land management advisory skills and our delivery teams have been attending key events such as LandAlive and HedgeFest to learn from others and bring back that learning into the Trust.

LINKING UP A LIVING LANDSCAPE

This year saw us completing the development phase of a pilot project on the Somerset Levels and Moors funded by DEFRA, part of the redesigned agri-environment schemes aiming

to pay land managers to deliver nature recovery at a landscape-scale. The Environmental Land Management Scheme Adapting the Levels project is located within part of the Brue catchment between Highbridge and Glastonbury, where we have been working really closely with 15 landowners over 1,000 hectares of land on a whole range of activities including; connecting up the landscape to restore natural processes to benefit habitats and species; protecting peat soils, improving water quality and hydrological connectivity; supporting landowners to adapt their land management to climate change and, in turn, supporting communities to become more climate resilient; and identifying long-term investment and funding to support landowners and nature recovery at scale.

It's been an enormous project to undertake, but we think the plans submitted at the end of the development phase will more than demonstrate the power of this approach. We hope to agree with DEFRA that we can enter



the delivery phase in January 2026 - a 20-year project whereby landowners will be paid to deliver land management through a mix of 'green finance' e.g. Nutrient neutrality and BNG, and a Defra ELMS LR payment.

VOLUNTEER VA VA VOOM

We couldn't achieve any where near the amount we do without the support of hundreds of volunteers. We delivered a range of habitat management and ecological monitoring activities across Somerset Wildlife Trust sites within the Avalon Marshes, as part of the Bogs and Bitterns project. Bioacoustic sensors were deployed at Catcott, Westhay Heath, Westhay Moor (inc. Westhay South), and Honeygar, with monitoring carried out by trained volunteers. These volunteers participated in sessions covering survey techniques for bitterns and great white egrets, orchard management, and the use of bioacoustic equipment. Capital works included the installation of culverts at Catcott and Westhay Moor South, and of an eel pass

CLAIRE HOLLINGSWORTH, Assistant Reserve Manager

Describe your job: I undertake a range of practical land management tasks across the Mendip nature reserves, helping to establish and maintain good quality habitats capable of supporting abundant biodiverse wildlife, and keeping our reserves safe and accessible for visitors.

What energises you in your job?: I feel lucky to have a job where I am outdoors surrounded by nature and wildlife, being reminded everyday of why we do what we do, what we have achieved, and the future possibilities, learning a little every day, and working with our amazingly dedicated volunteers.

What makes you proud to be at Somerset Wildlife Trust?: The reaction I get from people I meet - they have so much appreciation for what we do and think that we are doing a great job. I'm proud to be part of a multi-talented organisation that is making an impact in so many different ways.





at Westhay Moor to aid species recovery. Habitat maintenance works comprised reedbed cutting at Westhay Moor and Westhay Heath and topping of the lows at Catcott. To support wetland restoration, hydrological assessments were commissioned for Westhay Moor South and Beckery, a nearby site in Glastonbury managed in partnership with Friends of Brides Mound and the South West Heritage Trust. Volunteer-led activities at Beckery included meadow creation, bramble clearance, and orchard restoration, aimed at enhancing biodiversity and reducing habitat fragmentation. This objective also informed the panel assessment of seven Local Wildlife Sites, where the Project Ecologist engaged directly with landowners.

A PIECE OF THE PUZZLE FILLED WITH SHARPHAM

In 2024 we purchased just over 28 hectares of land at Sharpham Park. This land was previously organically farmed and mostly produced spelt wheat. We have purchased the land to improve it for wildlife and bring this area of relatively high ground into the wider mosaic of habitats within the Somerset Levels and Moors landscape, and to create a corridor

for wildlife to other land owned by other nature-friendly landowners. We have worked through our ecology team and Somerset Council to understand, develop and market the improvements we are making to this land for wildlife through Biodiversity Net Gain (a way of funding this work long-term). Through this process we will not only understand the Biodiversity Net Gain process, but we are contributing to raising standards by establishing a scheme that really delivers for nature. It is also a way of demonstrating to others how it's possible to finance nature friendly land management.

NOTHING DOES BUSY LIKE A BEAVER

Somerset Wildlife Trust was commissioned by the Farming and Wildlife Advisory Group South West (FWAG SW) with funding from Somerset Rivers Authority (SRA) to produce a Beaver Management Guide for Somerset – an extensive and rigorous piece of desk-based research involving engagement and input from professional, private and public stakeholders. Over a 10-week period, by the end of autumn 2024, we had organised and run three community events, held one online information webinar, given

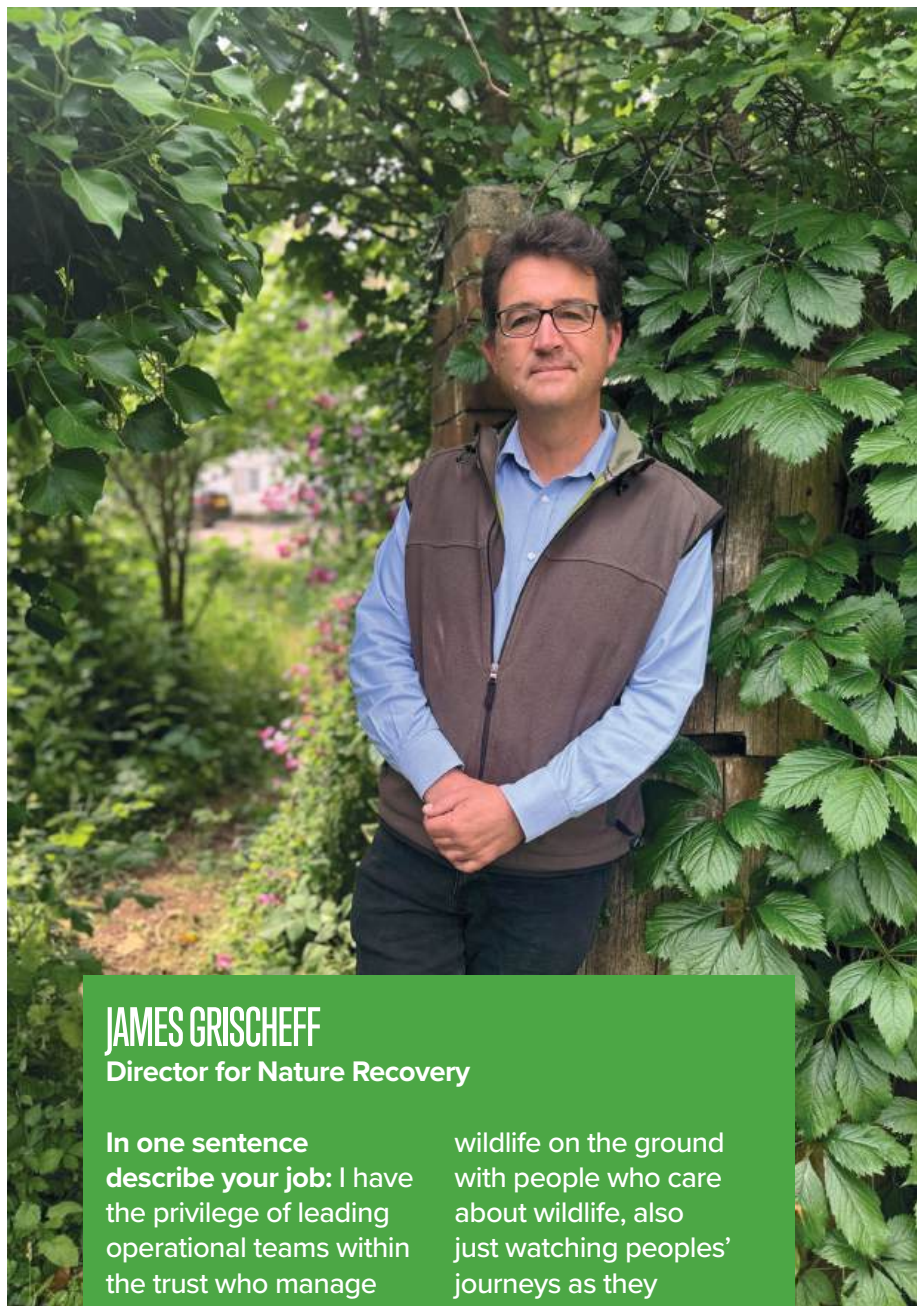
four in-person presentation/Q&A sessions, and had 321 responses to the online survey we designed to gather thoughts, views and opinions on the return of this very special keystone species. We were also able to involve our amazing Youth Forum, with an event designed purely for their feedback. Our Human-Wildlife Co-existence Officer was able to use of of this to generate the final document - Somerset Beaver Management: Guide and Recommendations. The document, which is available on our website, is a comprehensive overview of the issues and, in addition to suggesting target actions, it provides information on the national frameworks and guidelines that must be followed and the organisations to contact for extra advice and support. We are very grateful to everyone who provided feedback and hope you find the Guide useful.

MARTENS ON THE MOVE

2024 was an exciting year for the Pine Martens Bounce Back project. In spring, the partnership, including Somerset Wildlife Trust and led by Devon Wildlife Trust, was approved for funding by the National Lottery Heritage Fund. The project then

recruited a Youth Pathways Officer, and two Field Officers and two Engagement Officers (one for each of Dartmoor and Exmoor). Somerset Wildlife Trust hosts the Exmoor Engagement Officer who has been doing amazing work helping local people prepare for pine martens' return including hosting drop-in events, attending community events, working with schools and supporting artists to tell the pine martens' stories. In autumn, 15 martens were successfully translocated to Dartmoor. Supporting local communities, the first Partnership Forum was held in January, bringing together representatives from special interest groups, eNGOs, local businesses and land owners for a project update and to hold respectful discussion about strategies to support co-existence going forwards – an exciting step on our journey, with licence applications submitted for possible translocation to Exmoor in autumn 2025.

15 pine martens
were successfully
translocated to
Dartmoor in 2024



JAMES GRISCHEFF

Director for Nature Recovery

In one sentence describe your job: I have the privilege of leading operational teams within the trust who manage our incredible reserves, influence land and wildlife management outside reserves and undertake research and manage vast amounts of wildlife data and evidence. I also work with a committed, smart and diverse bunch of trustees and executives who set the strategic direction of the trust.

What energises you in your job?: I love seeing real things happen for

wildlife on the ground with people who care about wildlife, also just watching peoples' journeys as they continue to grow their action and expectations for wildlife.

What makes you proud to be at Somerset Wildlife Trust?: I work with a truly fantastic bunch of dedicated individuals (be they staff or volunteers) who make great stuff happen for wildlife. They understand this stuff is hard and not always fast but they keep being creative and pushing ahead.

NATALIE BARNETT

Climate Adaptation Officer

Describe your job: I coordinate climate adaptation planning with Somerset communities, helping them develop practical, locally tailored strategies to adapt to climate change.

What energises you in your job?: Witnessing communities take ownership of their climate adaptation journey,

transforming initial anxiety into collective action for nature and climate.

What makes you proud to be at Somerset Wildlife Trust?: That Somerset Wildlife Trust is being realistic and proactive at tackling climate change, supporting local communities and working with nature as we adapt to inevitable impacts.



SPOTLIGHT

Adapting to Climate Change Across Somerset

This year we've been working with communities across Somerset through our Act to Adapt project, funded by the Somerset Rivers Authority, to develop locally-led responses to our changing climate.

Our three-stage process brings communities together to Talk about climate risks, Shape their adaptation priorities, and Act on their plans. We've collaborated on Climate Adaptation Plans for eight communities, including Glastonbury, the Polden Hills, Minehead, Wells, Burnham-on-Sea and Highbridge, and the Under Hamdon Parishes. These aim to be more than documents on a shelf but living guides that communities are using to plan climate action.

Each community receives £1,000 funding to help kickstart their adaptation actions. Communities are now planning diverse projects reflecting their local priorities and challenges. Glastonbury is

planning semi-permeable pathways to reduce surface water runoff and workshops at Bridie's Farm to teach residents skills like creating rain gardens and green roofs. In the Poldens, Shapwick Parish Council is planning to plant trees and wildflowers, whilst Catcott Primary School aims to create a climate-resilient garden that will help educate young people. Burnham-on-Sea and Highbridge are developing comprehensive tree strategies and sustainable planting initiatives to increase urban canopy cover.

We've engaged 1,107 people across all communities through workshops, consultations, and launch events. With more communities are reaching out all the time, there is a real growing interest in local climate action. This grassroots approach is helping communities across Somerset build resilience and prepare for the challenges ahead.

WHAT WE ARE GOING TO DO IN 2025/26:

SMARTER DELIVERY AT A LANDSCAPE-SCALE

Scaling up our efforts to meet 2030 targets set out in our strategy is key, and this year will see our teams working with others in a far more collaborative way across four distinct priority landscapes – Mendip Hills, Somerset Levels & Moors, Tone Vale and Somerset's Coast. We will create unique Action Plans for each distinct area, focussing on where we can have most impact. We will reach out to and work in collaborative partnership with landowners, farmers, businesses and communities - whether that is in creating and connecting green corridors for wildlife or mobilising communities to deliver the collective impact we need and restore the quality of the ecosystems upon which we all depend.

SHARING OUR SKILLS AND EXPERTISE WITH OTHERS

Somerset Wildlife Trust is over 60 years old. We have accrued an intimate understanding of the unique habitats and wildlife within our amazing county. We are so proud of that, and our people – and now is the time we must be so much more proactive in sharing our skills, knowledge and experiences with others. This year will see us further develop our land advice offer, so others can come to us for support in taking forwards their ambitions to

manage land with nature in mind. From private landowners, farmers, businesses, parish councils to community groups, we will offer strong support and guidance for projects of any size and scale and of any kind, from securing funding, exploring green finance to habitat and wildlife surveys and green space management.

GIVING OUR COAST A BRIGHTER FUTURE

The Somerset marine environment and its delicate ecosystems are vital for a huge range of species - as nursery habitats for endangered fish such as twaite shad and a critical step in the incredible journey of the European eel. It is one of the most protected areas in the UK, with national and international designations and, more critically, is one of the county's front line defences against the impacts of climate change. Despite this, it is coming under continued pressure.

Working with our incredible Shore Search and Sea Watch volunteer groups and others, including academic institutions and regulatory bodies, this year will see us doing much more to understand the range of impacts on the estuary from developments and recreation on the overall condition of the marine life and habitats. This important data will inform our work, enabling us to pinpoint the projects that will have meaningful and direct impact.

BIGGER, BETTER, MORE JOINED UP

In order to deliver the 30x30 target for Somerset, we need to bring more land into permanent management for nature to recover. We have a minimum target of an additional 500 hectares by 2030, which is a 30% increase to our own land holdings. We hope this year to continue to acquire new sites when land with potential becomes available in the right place, to buffer or expand existing nature reserves, restore ecosystem function and support the county's nature recovery network – or to engage and connect people and communities with nature so they can play their role in nature's recovery too. Owning land also gives us opportunity to trial, demonstrate and showcase how land can be managed to achieve the best outcomes for nature while also generating income or delivering other outcomes.





GOAL 2

A movement for nature

FACTS AND STATS

70% of UK adults surveyed agreed that being close to nature improves their mood.

57% said they experience the benefits of nature while they go about their daily lives

70% of adults state that they can walk to their nearest local green space within 15 minutes.

25% of adults walk more than 15 minutes to their nearest local green space.

4% of adults never walk to their nearest local green space

(Source: Mental Health Foundation – 'Nature: How connecting with nature benefits our mental health' 2021)



The challenge

Jane Goodall once said “You cannot get through a single day without having an impact on the world around you. What you do makes a difference, and you have to decide what kind of difference you want to make.” Awareness of the environment and the issues it’s facing is at its highest level, but our collective behaviours still do not match our concern or the scale of the challenge. We need both individual action and collective action to hold local and national decision makers accountable for their actions, and to act to create an environment that is full of nature, and accessible for all.

Our approach

To see the real shift in behaviour that’s required to tackle the challenge we need as many people as possible, from every area of society making a positive contribution to nature’s recovery by doing what they can. Our Team Wilder ethos (a way of working that enables us to work with communities and to build momentum that ultimately results in action for nature) uses the principles of psychology and the individual, social and physical influences that encourage us to act. This way of working pulls in the science, knowledge and practical application of behaviour change, community organising, movement building and nature connection to build a team of people taking action for nature across the county that they love.

What we aimed for

This year we wanted to **build on our learning and successes** from the previous year and create an engagement framework and delivery plan that was more tightly focussed on delivering the activities that will help us to **scale up** and **speed up** action for nature across the county and, in turn, have a greater impact. Key to this, was launching a **Volunteer Action Plan**, setting out our commitment to enhance the volunteer experience across the Trust – we can’t do what we do without them. Our aim was also to develop a robust methodology for **measuring the impact** of our work, **collecting the stories and statistics** which will tell us more about the successes and lessons learnt from our way of working.

OUR IMPACT IN NUMBERS

3,702 people took part in nature experiences facilitated by Somerset Wildlife Trust

OVER 100 people are now part of the Private and Community Nature Reserves Network

1,107 people engaged with Act to Adapt climate adaptation plans

443 active volunteers supporting work across all Somerset Wildlife Trust teams





WHAT WE DID:

WRAPPING UP A WILDER COAST

This year saw our Wilder Coast project come to a close. The ambition of this fabulous three year project was to empower coastal communities to play their part in creating a more resilient Nature Recovery Network for this often undervalued part of our county, and to increase people's involvement in coastal citizen science recording and monitoring to inform Somerset's State of Nature.

As well as putting the spotlight on all that is so special about this wonderful piece of coastline and why it is so vital we protect it, important too was raising awareness of the connection between Somerset's coast and the county's river catchments and inland habitats. Encouraging local communities to see how the health of their own local habitats and the quality of their rivers and streams that eventually enter the Severn Estuary impacts on Somerset's coast is vital if we are to bring about positive decisions for this undervalued asset.

An incredible number of

communities, groups and individuals got involved in the project through a whole range of activities and events designed for people all all ages, with art and theatre inspiring new audiences – a special pop-up recycling shop was even created by a youth group, Stacked Wonky, to highlight the impact of litter on marine habitats.

We were able to develop and grow two dedicated volunteer teams, one surveying our rocky and muddy intertidal habitats (Shoresearch) and one monitoring local sea mammal populations (Sea Watch). The work of these fantastic volunteers has been invaluable in data collection and supporting these groups to become independent will be a key element of our ongoing coastal delivery work.

A newly created Somerset School Coastal Champions Award saw us working with schools and young people to involve them in exploring the amazing habitats on our coast, and we were able to deliver outreach visits to youth groups too. There was so much to celebrate at the end of project

event, which was attended by project participants, groups and partners and showcased some of the amazing achievement. The whole project has demonstrated the real passion and commitment in our coastal communities for standing up for Somerset's brilliant coast.

Although the Wilder Coast project has come to an end our work across the coast will not stop. We are developing our plans for the next phase, whilst our wider Engagement Team continue to make sure the coastal citizen science survey teams, community groups, schools and youth clubs we have been working with are supported by us or our partners to take action for nature.

The Wilder Coast project was funded by the Hinkley Point C Community Fund (via the Somerset Community Foundation) and National Lottery Climate Action Fund grants.



NATURE RECOVERY TEAM RECRUITS TREE-TOP ACROBATS

Not quite true, but this year did see us joining Pine Martens Bounce Back: The Two Moors Pine Marten Project as partners. This brilliant project aims to restore the natural balance of our much-loved woodlands by bringing back pine martens to the landscapes where they once thrived - there's no doubt they are a fantastically charismatic species and a wonderful sight to see in the wild. Returning such species to Somerset, where this can be done sustainably and with community support, enriches our world – a message that our new Pine Martens Engagement Officer (Exmoor) has been busy getting out across Exmoor communities. We have held a number of really positive community collaboration events and drop in consultations for local communities about the project and their reintroduction to inspire and support people of all ages and walks of life to become Pine Marten Pioneers, growing their conservation skills, capacity and leadership confidence in the process. The people attending the

BECKY FISHER

Head of Engagement

Describe your job: I'm Head of Engagement; I lead the team who inspire and support people to take action for nature.

What energises you in your job?: The stories people have to tell. Everyone has a story to tell about nature and what it means to them; I love hearing those stories and how inspiring they are.

What makes you proud to be at Somerset Wildlife Trust?: The people I work with. Working for an organisation where everyone cares about their work and wants to make a difference for the wildlife and people of Somerset is really special.



drop-in sessions have been really engaged, attending with specific questions or looking for certain information and resources. Some feedback has included:

"Good to see a properly planned, well thought through reintroduction"

"I feel really inspired now"

"Nice to see Somerset Wildlife Trust having a presence in Exmoor"

TAKING A WALK ON THE WILD SIDE WITH A NEW ROLE

Building on our previous three year Nature Connections partnership project and as part of our Wilder Wellbeing project, funded by The Ninesquare Trust, we were excited this year to welcome a new Wilder Wellbeing Officer to the engagement team. A completely new role for the Trust, it will be focussed on driving, embedding and promoting the benefits of a connection with nature, and working with a whole range of teams, groups, communities, organisations and individuals across Somerset to experience the benefit of nature connection. Work will include supporting community groups to organise nature connection specific activities, enabling people to experience the wonders of nature and make life-long connections to the natural world to benefit physical and mental wellbeing - as well as supporting our volunteers to put nature connection into communities. We are really excited to have these skills on board to help drive what is a really critical part of our work.

IT'S ALL ABOUT BOGS AND BITTERNS

An unusual name for a project perhaps, but quite apt in fact for this wetland restoration focussed project. Funded by DEFRA's

Species Survival Fund, the Bogs and Bittern project aims to restore the wetland character of four nature reserves and newly create three good quality 'stepping stone' sites for wildlife across an area of 50 hectares of the Somerset Levels and Moors – one of which will be the bittern – the iconic wetland bird of this landscape.

A key part of the project is delivering an activity programme to engage, inspire and upskill local people. We've been so pleased in particular to support local group, Friends of Bride's Mound to grow their volunteer group and ensure they secure a volunteer lead to continue efforts beyond the life of the project. Volunteers, including young members from the YMCA, have been involved in multiple events at Beckery, including a bramble clearing session, orchard management training, and willow cutting to create a dead fence. To connect with the wider volunteering opportunities in Glastonbury, we are supporting the Friends group to create a community celebration event to get more people involved. We've been developing plans for year two of the project, with climate adaptation events, a bioblitz and a youth event already on the cards.

Supporting people to get a better understanding of how species abundance is increasing on the reserves and these stepping stone sites is crucial. Thanks to this project we have been able to go super high tech and deploy innovative new bioacoustic monitoring equipment to monitor bird species teamed with AI technology analysis, and increase the number of wildlife camera traps as well as carry out surveys to assess the condition of local wildlife sites.



SPOTLIGHT

Working with Somerset Libraries

This year the engagement team worked with Somerset Libraries to deliver a series of library exhibitions focusing on nature connection and supporting people to access nature in their local area, as well as training library staff to deliver a nature experience in a library setting.. These exhibitions included the showing of videos that were specially produced to promote Somerset's amazing natural places and the team running activity sessions. Providing opportunities for library staff to experience these events and learn from the team has given them the confidence to have conversations about nature and embed nature connection activities in their own work. Our Wilder Wellbeing Officer is now creating a toolkit for them to continue using throughout all library activities, and they have plans to run a nature themed summer reading challenge for children.

"I found Sal's Nature connection session at Yeovil Library today very inspiring and there were lots of good ideas shared."

ADAM MURRAY

Director of Action for Nature

Describe your job: Providing leadership and direction across our engagement, communications and fundraising work programmes. Ultimately enabling more people to take meaningful action for nature.

What energises you in your job?: Seeing our teams thrive and have impact, seeing positivity and enthusiasm in for our work. Making connections and problem solving in order to make things happen!

What makes you proud to be at Somerset Wildlife Trust?: Being able to see with my own eyes how we, our partners and communities are making a positive impact for wildlife and people in Somerset.



SPOTLIGHT

Practical skills and training

This year as part of our 30x30 Wilder Communities project, local ecologist Matt Collis delivered a series of practical skills training events designed for individuals to learn key skills in tree ID, pond restoration, hedge laying and coppicing. These practical and identification skills sessions equip communities to manage their own sites and monitor the wildlife living there. Attendees found these workshops positive, and many were planning to use their new skills straight away. Here's what people told us:

"It had a positive impact on my ability and confidence to get involved in nature and environmental projects. I was encouraged to think about volunteering with more conservation and wildlife projects."

"It has given me new knowledge about wildlife and the practical pond restoration skills but also highlighted how these things can be approached as team/sharing skills in the community."

"Yes, I did learn some new skills. Quite importantly how not to fall into a wildlife pond whilst reclaiming it! I have already built a wildlife pond, so I was interested in the different way Matt went about the construction and learnt some important maintenance and future care tips."

"The finer details of each tree, placement and shapes and sizes of buds, lenticels, very interesting to take time to really look closely. Excellent leader, good pace, not rushed, the time was well utilised, but it went by really quickly, even though it was 3 hours long!"

PIPPA RAYNER

Wilder Engagement Coordinator

Describe your job: I support people to take action for nature through increasing understanding of nature, how it 'works' and how they can have the most positive impact, as well as helping people to join up, join in or share what they are doing with others.

What energises you in your job?: When, through my advice or support I help communities, land managers or partners to either conserve existing valuable habitats, or

take steps towards restoring or creating additional areas of habitat, helping to create the network of sites needed for nature to recover.

What makes you proud to be at Somerset Wildlife Trust?: Our nature reserves, as a vital glimpse of the nature-rich habitats that were once everywhere - to the benefit of everyone - and that could return if we act swiftly; and my colleagues, as the people striving so hard to make this so.



SIÂN BENTLEY

Wilder Youth Officer

Describe your job: I work with 12 – 24 year olds and support them to get involved in wildlife conservation through our youth forum and youth-informed events programme.

What energises you in your job?: Many oat milk mochas! Just kidding. I feel so lucky to work alongside our youth forum. We help each other take action

for nature and support each other's ideas – they energise me more than anything else.

What makes you proud to be at Somerset Wildlife Trust?: I'm proud to be surrounded by people who work to make nature accessible and are willing to be endlessly flexible and creative in order to engage communities.

WHAT WE ARE GOING TO DO IN 2025/26:

BUILD NETWORKING AND SKILL SHARING

To continue our community work in 2025 we need to speed up and scale up. We will do this by embedding community engagement and action for nature across all the Trust's teams and across all of our priority landscapes. We also want to facilitate networking and convening opportunities across priority communities, providing community leadership and conservation leadership training, as well as demonstrations of best practice. This will include delivering our Wilder Together event in October, bringing communities across Somerset together to share and learn from each other.

DELIVER THE VOLUNTEER ACTION PLAN

In the next year we will start carrying out the commitments we outlined in our Volunteer Action Plan. These include biannual volunteer management training for staff, an annual volunteer celebration event and measuring the progress of the plan with creative methods that reflect the experiences of the volunteers of Somerset Wildlife Trust. We want to expand the way we celebrate and tell the stories of our volunteers, showing the breadth of the work they do, and celebrating their personal stories.

DEVELOP AN 'ACCESS FOR ALL' PROGRAMME

We want everyone to have the opportunity to experience nature on our nature reserves but also in the places they live. We plan to do this through training and working with others in the art, sport and health sectors and creating new and more experiences for people to feel connected to and included within nature that inspires action beyond that first experience.

We want to build on the successes of our Youth Forum and the youth element of our 30x30 Wilder Communities project to inspire and encourage the next generation of nature / environmental leaders across Somerset Wildlife Trust and the communities we work with. We'll continue to grow our engagement by supporting secondary and tertiary education providers within our communities, to embed action for nature in their curriculums. This is about more than supporting the next engagement or nature recovery team members, but also about finding and supporting those who want to work in the wider conservation sector as well as related sectors that can positively impact nature. It's essential that our future urban planners, teachers, politicians, architects, farmers, financiers, basically everyone, understands how important nature is for us all.





GOAL 3

Telling Somerset's story

FACTS AND STATS

3.4 million records currently held in Somerset Environmental Records Centre databases.

67 taxons with 1,711 different species recorded this year.

80% of these were insects, with the most commonly recorded being the meadow brown butterfly.



The challenge

The importance of evidence to underpin nature recovery has never been greater – as well as enabling us to prioritise our own work and measure the impact we are having. With a new government it is critical to demonstrate what has been achieved but, more importantly what is still left to do. Policy review is underway, including to try to unlock development in the county and nationally and Somerset Wildlife Trust is working locally and with the other 46 Wildlife Trusts to influence reforms to ensure that valuable gains are not lost. As innovative initiatives like the Local Nature Recovery Strategies and ELMS Landscape Recovery pilots are rolled out, our contributions to monitoring and impact measurement through SERC and Somerset Wildlife Trust will be core to successful implementation.

Our approach

We have continued to build the strength of data held in the Somerset Environment Records Centre by recruiting a large and excellent cohort of volunteers to process data to include in our database. As well as building our own evidence base, we recognise that we are only one part of a bigger system working for change. We are working with universities, businesses and researchers to identify evidence gaps and develop research projects that fill them in order to better understand what's needed for nature's recovery.

What we aimed for

One of our major aims this year was to **support the work of Somerset Council** as the responsible authority for the development of the **Local Nature Recovery Strategy**. We brought together experts and organisations from across broad communities, through our coordination of the Local Nature Partnership, to develop the **Local Nature Recovery Strategy** ensuring it is fully evidence based. We have continued to scale up our **research partnerships**, particularly around our pioneering wilding site at **Honeygar**, and have developed a new approach to **research collaboration** which will be launched in the coming year.

OUR IMPACT IN NUMBERS

17 local wildlife sites surveyed and taken to the Local Wildlife Site (LWS) panel

4 new post graduate projects started based at our flagship site on Honeygar. One MSc and one PhD from the University of West of England (UWE) and two PhD students from the University of Bristol (UoB)

5 University and research institutions interested, including UWE, UoB, University of Plymouth, Wessex Water, Natural England and the UK Centre for Ecology and Hydrology, at Honeygar and across our wider reserve holdings

75,071 records supplied to SERC's database from over 35 organisations as well as individual recorders





WHAT WE DID:

FOR PEAT'S SAKE

Coordinated by Somerset Wildlife Trust, in late 2024 the Somerset Peatland Partnership convened a Monitoring and Evidence Working Group to identify monitoring and research interests with a peatland focus across the lowland peatlands in the county. With partners like Avon Wildlife Trust, RSPB, Natural England and FWAG South West participating, and support from the University of Bristol, a gap analysis of the current monitoring and research projects is being undertaken which in turn will help to identify key issues, barriers and challenges. Short term funding for projects and research have often led to a piecemeal approach across the peatland landscape. This group aims to provide a longer-term strategy, that will provide evidence to help landowners make informed decisions, support the development of a lowland peat research centre at Honeygar and raise awareness around peatland issues in Somerset - not only for local communities but also policy makers at a national level.

CREATING A HUBBUB AROUND HONEYGAR

This year saw us run our first data workshop bringing together a group of 28 stakeholders, partners, academic institutions and volunteers to talk about our work at Honeygar. We had an amazing range of specialists and experts from RSPB, NE, Wessex Water, Bristol Uni, Rigare, Wilder Sensing, Recorders of the Avalon Marshes (ROAM) and Honeygar Rangers all in one room discussing a huge range of topics from hydrological and green house gas monitoring to lowland peat restoration and bioacoustic monitoring. Driven by clear ambition to stabilise and protect peat soils at Honeygar through our wilding approach, the site has attracted interested researchers from a range of backgrounds, and we are keen that any research developed can be used to support other landowners on the Somerset Levels and Moors to protect the peatlands they manage. Brilliant new connections were formed with Wessex Water which led to,

further conversations through site visits and the opportunity for Honeygar to be used as a study site for a new PhD formed in partnership between NE, Somerset Wildlife Trust and Plymouth University in 2025. The workshop also set the scene for an annual Somerset Wildlife Trust research partnership event focused on data and evidence, drawing insights from across the Trust to showcase all the important work that is going on within the Avalon Marshes Landscape and beyond.

WIRED FOR SOUND

Through funding provided by the Species Survival Fund (SSF) we were able to expand our innovative Wilder Sensing Network at Honeygar increasing the number of bioacoustic sensors from 4 to 8 on site, in addition to installing 3 sensors on Westhay Moor, Catcott and Westhay Heath. The sensors are set to record bird song on a continuous basis 24 hours a day, 7 days a week and 365 days a year capturing millions of audio records which are analysed by



Artificial Intelligence. This will allow us to monitor nature's recovery on a landscape-scale enabling comparisons between sites and have a more robust data set to tell Somerset's story. Six camera traps were installed across the site, enabling us to track changes in elusive species on site such as otter, water vole and other wildlife. As the site becomes wilder, we will be able to monitor changes in species using the Honeygar site to demonstrate how it is changing.

8 bioacoustic sensors are set to record bird song on a continuous basis at Honeygar in addition to installing 3 sensors on Westhay Moor, Catcott and Westhay Heath



JOE HAMPSON
Honeygar Wilding Officer

Describe your job: I facilitate our wilding approach at Honeygar, helping to guide land management practices that allow nature to take the lead, whilst stabilising and protecting our vital peat soils.

What energises you in your job?: Lowland peat is critically understudied. Through our approaches on site we are always learning new things that have the potential to guide a future of farming in the Avalon Marshes.

What makes you proud to be at Somerset Wildlife Trust?: I am proud of how hard everyone works to protect wildlife and our wild spaces within the county, whilst engaging communities and driving measurable change.



RAMPING UP THE RANGERS

The Honeygar Rangers continue to be a vital part of telling Somerset's story as we evidence how our wilding approach is stabilising and protecting our precious peat, whilst facilitating nature recovery on site.

Over the last year the Rangers have been hard at work continuing their monitoring of our dipwell network to show changes in hydrology, monitoring harvest mouse numbers on site, managing our wilder sensing network and surveying for birds, dragonflies, bumblebees, in addition to tracking changes in species through our camera trap project.

This surveying season, we continue to build capacity and skills within the Rangers, particularly to support the exciting developments around the buildings at Honeygar. Brushcutter training has enabled Rangers to help with routine maintenance tasks around the farm. The quadrat surveys they carry out help us create a baseline of the floristic diversity of the burtle, and orchard management training has built capacity for us to restore and manage our own orchard on site.

Thanks to our Rangers, Honeygar is fast becoming a key site for community engagement within the Avalon Marshes, enabling people to take positive action for nature, improve their wellbeing and learn new skills along the way. We really can't thank them enough for all they do!

IT'S ALL ABOUT THE DETAIL

With the help of 13 volunteers, a new focus on data processing and a new admin officer, over the past 18 months, we've been able to enter an incredible 242,688 records, increasing our species records database holdings by 8%. We've increased our usage of data submitted from the public through the introduction of our Online Recording System (ORS,) which has seen records being added and immediately advising consultancies and developments through our data search processes. This data increase will make an important contribution to our ability to monitor trends in nature and biodiversity in the county.

13 volunteers, a new focus on data processing and a new admin officer have helped increase our species records database holdings by 8%

ADAM PREECE

Honeygar Project Manager

Describe your job: I lead the project to convert the redundant farm buildings at Honeygar into a centre for lowland peat research.

What energises you in your job?: I love the ambition of Honeygar and the drive to find the best, not always easiest, ways to achieve our vision.

What makes you proud to be at Somerset Wildlife Trust?: Everyone that works here does so because they genuinely care about wildlife and the natural world.



CASE STUDY

Great white egret

A notable data and monitoring success story is the increase in numbers of the great white egret, previously considered to be a rare species, with as few as 150 pairs recorded across the whole of Europe in the 1970s. Habitat restoration on the Somerset levels has led to a record breaking year in 2024, with 97 pairs attempting nesting in 13 separate locations, 179 chicks hatched on 63 nests, with 100 eventually fledging from 54 of these nests (the first time in triple

figures). A ringing programme using qualified ringers has allowed us to track the movements of local juveniles and the 2024 Somerset cohort of colour ringed juveniles has dispersed widely. The birds have been reported from Bedfordshire, Cambridgeshire, Cheshire, Dorset, Essex, Gloucestershire, Kent, Lancashire, Lincolnshire, Northumberland, Nottinghamshire, Oxfordshire, Powys, Somerset, Worcestershire and Yorkshire.



SOPHIE LAURIE

Head of Innovation and Evidence

In one sentence describe your job: I lead a team of specialists including in the Somerset Environmental Records Centre, who focus on making sure everything we do in Somerset Wildlife Trust is based on sound information and evidence.

What energises you in your job?: Looking for innovative opportunities to grow our evidence base and show the value of working in partnership with Somerset Wildlife Trust, bringing in new and exciting public and private sector projects to deliver our ambitions for nature recovery.

What makes you proud to be at Somerset Wildlife Trust?: Being part of an organisation of passionate people wanting to really make an impact on halting and reversing the decline in biodiversity in Somerset and the wider UK.

PAUL TANSLEY

Science and Data Specialist

Describe your job: As the new Science and Data Specialist, I'm focused on enhancing the evidence base the Trust uses, building partnerships with universities, and developing new tools to facilitate our work.

What energises you in your job?: What energises me most about my role is transforming complex ecological data into meaningful insights that drive real-world conservation impact, while collaborating

with cutting-edge scientists and researchers to better understand the systems we all rely on.

What makes you proud to be at Somerset Wildlife Trust?: I'm proud to be at Somerset Wildlife Trust because I get to work with passionate people making a tangible difference, protecting nature, restoring habitats, and empowering communities to value and care for wildlife across the county.



WHAT WE ARE GOING TO DO IN 2025/26:

REVIEW AND UPDATE THE SOMERSET STATE OF NATURE (SSON) REPORT

The first SSoN report launched in autumn 2023 was an important milestone in creating a county level understanding of the condition of the county's natural environment, and establishing a baseline for species and habitat for 2030 targets. Learning from this inaugural report and with a view to being aligned to the UK State of Nature report (released every 3 years), we have consulted with the members of Somerset's Local Nature Partnership and other relevant stakeholder and agreed to prepare a second report in autumn 2026. This will give us time to properly review the first report, its content, use and accessibility, and to work towards the most comprehensive and valuable document possible.

DELIVERING THE LOCAL NATURE RECOVERY STRATEGY

The Local Nature Partnership will also be a valuable resource when developing the process for monitoring and reviewing the implementation of the LNRS. With a newly formed Science and Evidence sub group of the LNP we will be well placed to gather information from across the county, working closely with Somerset Council as the Responsible Authority to ensure outcomes are captured and lessons are learned.

RAMPING UP OUR RESEARCH PARTNERSHIPS

Somerset Wildlife Trust is a science and evidence led organisation. In order to make the best-informed decisions and have the best chance of success in achieving our goals we

need to have the best data and evidence on which to base our action. The rapid advances that are being made in the research and technology landscape mean that we should at the same time embrace innovation and be open to new ways of working, recognising the importance of learning from others. This year has seen the development of an exciting new research prospectus offering to spotlight opportunities for collaborative projects within the academic sector, which support us achieving our strategic goals. We are excited to be launching this offer in the coming year, and inviting ideas and contributions from a range of stakeholders, including universities and business and individuals.



Our people and organisation

A decorative graphic consisting of two parallel white lines that start under the first line of the title and extend to the right, with a slight upward curve at the end.

- ▶ Developing Somerset Wildlife Trust
- ▶ Volunteers
- ▶ Fundraising



DEVELOPING SOMERSET WILDLIFE TRUST

At Somerset Wildlife Trust, our staff are united by a deep passion for nature and a shared commitment to our organisational vision and goals.

Together, we are driven to deliver Wilder Somerset landscapes and champion nature-based solutions that benefit both wildlife and communities across the county. We take great pride in the progress we have made in protecting Somerset's rich biodiversity and natural habitats.

Our ambition is to continue growing Somerset Wildlife Trust in a way that reflects our core values, ensuring that our resources are aligned with the delivery of our strategic aims. From an operational standpoint, we are focused on building a workforce that is productive, efficient, valued, and inclusive, supported by modern IT systems and facilities that promote collaboration, inclusion, and a healthy work/life balance.

We have made significant strides in strengthening our IT and digital infrastructure. These improvements are helping us enhance the

customer experience, improve data sharing, and foster greater cross-team collaboration. In parallel, we have worked closely with staff to define and embed our organisational culture and values, laying the foundation for a resilient and forward-looking Somerset Wildlife Trust.

A key area of transformation this year has been our focus on people with the development of an inclusive and diverse learning culture. In response to the evolving needs of our larger, hybrid workforce, we have adapted and enhanced our systems and processes. Through the implementation of our workforce development plan, we are ensuring that the right people with the right skills are in place to meet emerging demands—particularly in areas such as research, evidence, and green finance.



HELUN JONES

Head of People, Culture & Resources

Describe your job: I am the Head of the People, Culture & Resources Team based at our Head office in Taunton.

What energises you in your job?

Knowing that the operational support that my team gives across the organisation enables the Trust to achieve its goals in supporting wildlife and its habitats.

What makes you proud to be at Somerset Wildlife Trust?

I am proud to work for an organisation that cares about the positive impact its work has on the local environment and the communities that it serves.

Highlights from our work in 2024/25

Digital transformation: We have embraced digital technologies to boost our impact, efficiency, and productivity across all areas of work. SharePoint was adopted as our central platform for storing, organising, and sharing information, streamlining workflows and improving data access. We continue to enhance its use with KPI dashboards, navigation hubs, and trackable forms like our performance management form and land advice recording database.

To connect people with nature, we have continued our installation of wildlife cameras on our reserves, action from which can be viewed online by those perhaps who cannot get to our sites, alongside a complete virtual tour of the reserve. For those who do visit, instant information about the site, its wildlife and for orientation is accessible via QR codes accessed by mobile phones. We are a leader in the space across the Wildlife Trust movement, having launched an online resource to support other Trusts who want to do the same.

Additionally, we are reducing our carbon footprint by using smart digital tools that minimise email traffic and improve communication.

People At Somerset Wildlife Trust, our people are at the heart of everything we do. We are committed to supporting, developing, and investing in our workforce to ensure Somerset Wildlife Trust is inclusive, representative, and accessible to all.

In response to our evolving organisational needs, we redefined our workforce structure through the implementation of a comprehensive Workforce Development Plan. This plan is designed to future-proof Somerset Wildlife Trust by aligning our people strategy with the demands of a growing, hybrid, and highly skilled workforce.

Continued growth saw the implementation of a new leadership structure involving the recruitment of three Directors to support our CEO which has led to

VICTORIA BROWN

People, Culture & Resources Office Manager

Describe your job: I manage the facilities for our offices and play a key role in ensuring health and safety across the organisation.

What energises you in your job? Ensuring that facilities and procedures are in place so that my colleagues can work effectively and safely gives me a real sense of motivation and satisfaction.

What makes you proud to be at Somerset Wildlife Trust? Knowing that we are making a difference for Somerset and the future generations that will live here. And I find everyone's passion for what they do truly inspiring!



a more strategic, impact-focussed approach to our work, expanding opportunities for nature recovery in the county.

Following staff consultation, we launched a redesigned Performance Development process in June 2024. This new digital platform enables staff to set and track their performance objectives, each with associated Key Performance Indicators (KPIs) directly linked to the delivery of our strategic goals. To support this transition, managers received training not only in the new system but also in essential leadership skills.

This work is closely aligned with our transformational commitment to fostering a diverse and inclusive learning culture. We established a structured curriculum of learning opportunities, ensuring all staff have access to the resources they

need to grow their skills and knowledge.

Our Equality, Diversity, and Inclusion (EDI) Plan has driven significant progress in cultivating an inclusive workplace culture. Notably, we achieved Disability Confident Level 2 status, reflecting our dedication to creating a supportive and accessible environment for all.

Facilities Management of our facilities enables the creation of a working environment that supports our people and enables us to deliver our strategy.

Rearrangement of office space within our Head office in Taunton enabled us to bring associated teams together in one space. And in Callow, painting and rearrangement of office space enabled the freeing up of meeting rooms and more effective use of the space. To progress the development of Honeygar, our flagship wilding project, a Project manager was employed who has extensive skills and knowledge within the building sector to oversee development of the buildings.

Environmental Strategy We continue to take forward our ambitious environmental strategy as we implement, monitor and report on progress of Somerset Wildlife Trust carbon reduction plan and capture data on our carbon impact on our environment for Royal Society of Wildlife Trusts.

Our Climate change group provided excellent training and consultation opportunities with staff throughout the year including external speakers

on this key topic, all to increase environmental knowledge across the organisation. We continue to report on our impact on the environment providing key statistics to the Royal Society of Wildlife Trusts annual impact survey sharing knowledge and helping us further reduce our own carbon footprint.

Culture: Having a strong and positive culture is pivotal to our success. This year, we revisited our organisational values and behaviours through a series of inclusive staff workshops, inviting input from across the Trust to ensure our culture reflects the evolving workforce and strategic direction of Somerset Wildlife Trust.

From these sessions, several key themes emerged and we will be engaging further with our staff and volunteers to identify those that most resonate and help define our cultural identity. Values are more than just words—they will need to be a reflection of the pride, dedication, and passion our staff bring to their work every day.

In a rapidly changing world, it is essential that our cultural values evolve alongside our organisation. These refreshed values represent a significant step-change in how we operate, supporting our growth and enabling us to meet the challenges of delivering our strategic goals. They provide a strong foundation for a unified, forward-thinking Somerset Wildlife Trust—one that is equipped to lead with purpose and integrity. This work will continue to develop into 2025/26.



PAUL SMITH

Director of Business Planning and Development

Describe your job: I'm responsible for our Finance, People and Digital operations across the Trust and the development of our Ecology services business.

What energises you in your job? Our fantastic people and supporters, and the opportunity to continuously learn & develop are key motivators for me.

What makes you proud to be at Somerset Wildlife Trust?

Knowing that we are securing and restoring nature and habitats for future generations and seeing this happening at first hand right across the County.



EMMA GOULD

HR Specialist

Describe your job: I support key human resource projects and oversee the workforce cycle, whilst ensuring the mitigation of organisational risk. By supporting and empowering our employees to excel in their roles, the People, Culture and Resources Team ensures that their growth directly contributes to the strategic objectives of the Trust.

What energises you in your job: I am privileged to work alongside and support remarkable colleagues who are experts in their fields. Their passion for nature has not only inspired me but has also enriched my own understanding and appreciation of nature and the environment.

What makes you proud to be at Somerset Wildlife Trust? The amazing, tireless work of our teams and their commitment to making a difference in what can be a challenging and politically charged world.

WHAT WE ARE GOING TO DO IN 2025/26:

CHAMPION A LEARNING CULTURE

In 2025/26, we are committed to embedding an inclusive and diverse learning culture across Somerset Wildlife Trust. This transformation is being integrated into our risk management framework, with clear links to our strategic objectives, risk actions, and key performance indicators (KPIs).

ON TRACK WITH TRAINING

To centralise and streamline access to learning resources, we will launch a dedicated Learning and Development Hub, providing all staff with a single point of access to training opportunities. This will be complemented by ongoing work to embed our refreshed values and behaviours throughout the organisation.

CREATE STRONG LEADERS

A continued focus on training and development will see the expansion of a broader, more diverse range of learning opportunities. This includes further upskilling of our management team to ensure they are equipped with the capabilities needed to lead effectively and support the delivery of our strategic goals and have the greatest impact. To support this, a skills gap analysis is planned to identify current capabilities and future needs across the organisation.

PROVIDE GREAT PLACES TO WORK

In support of our hybrid working model, we will also deliver a new Facilities Plan designed to enhance flexibility and inclusivity in our working environments.

ACTION FOR EDI

Our Equality, Diversity, and Inclusion (EDI) journey will continue, with a goal of achieving Disability Confident Leader status. In addition, our EDI efforts will extend externally through our Action for Nature programme, which aims to connect more people in our communities with nature.

LISTENING AND IMPROVING

We will continue to listen to our staff through our annual staff survey, using the insights gained to shape a programme of improvements. A dedicated staff working group will be established to support this work and ensure meaningful staff input into the development of solutions.



VOLUNTEERS

Our commitment to our volunteers

Volunteers are at the heart of what we do. Volunteers founded Somerset Wildlife Trust in 1964 and today remain fundamental to our work. They come from all walks of life, with a range of skills and experience, and we rely on their support to help create a Somerset rich in wildlife for everyone. They carry out a variety of roles, from practical habitat management and field surveys, to support for office activities and events, to running the Trust as members of Council, operating across the whole county from our brilliant coast all the way across our key landscapes and

projects. This year we launched our volunteer action plan, our commitment to achieving an inclusive culture of volunteering. The plan was written with our volunteers, who gave their time, opinions and expertise to develop it alongside staff.

In 2024, 443 volunteers contributed 13,235 hours in support of our work, which is the equivalent value of £196,270 in paid time. We celebrated at our Annual Volunteer Awards which took place at our 2024 AGM, with 3 individuals and 1 group winning awards, recognising their achievements in practical

reserves work, youth forum action, contribution to responding to planning applications and collection of marine wildlife data.

Our plans for 25/26

This year we're making a start on the commitments outlined in our volunteer action plan for 2025-2030. Each team has made individual commitments to develop and enhance the volunteer experience. Our Volunteering and Community Support Officer will be working with all teams across the Trust to oversee the implementation and monitoring of the plan.

“Being a Volunteer for Somerset Wildlife Trust is such a joy, having an organisation the aligns with your own beliefs and having support and training to deliver in my case, to young families who are nature nerds, love being out and discovering all sorts of beasties, birds, flora and fauna in a fun and free way is so rewarding.”

Helen- Wildlife Watch volunteer





FUNDRAISING

Fundraising continues to be a vital source of income for Somerset Wildlife Trust, helping the continued delivery of our 2030 strategy.

The fundraising climate is not only the environment sector, but across all sectors, continues to be challenging, so we are incredibly grateful to individuals, corporates and grant giving bodies across the county and beyond who support us. Uncertainty around the economy and the ongoing rise in the cost of living, remains of great concern to many people, and we recognise that some of our previous supporters find themselves unable to help us as they did previously.

Despite this, the 2024/25 financial year saw our membership rise above 23,000 for the first time, hitting a key milestone we set when writing Wilder Somerset 2030 for 2025. Without those people who generously commit to giving regular gifts, we could not plan and manage our core work so effectively.

Our major donor programme has continued to grow, attracting some remarkable and passionate individuals who are helping support projects and activities that align with their interests. We saw several significant donations given to help fund both our core work and exciting projects such as Honeygar. These major gifts have had an enormous impact on our ability to deliver our strategy and we could not be more grateful.

We know that choosing to support a charity is a very personal decision and people do it in all sorts of ways. We have a wonderful group of people who have chosen to leave Somerset Wildlife Trust a gift in their will. Our legacy programme has developed considerably in recent years, and those that pledge a gift in this way demonstrate a commitment to Somerset's wildlife and wild spaces that is helping restore nature for future generations.

This year saw us take the first steps towards developing our corporate membership offering, the impact of which we hope to see in the next year and beyond, and we have honed our due diligence process in light of our ambition, to develop bespoke, broader corporate partnerships with Somerset's business community. We are already seeing companies across Somerset who are determined to demonstrate their commitment to a wilder Somerset, and we are excited to develop these relationships further.

The trust and grant fundraising landscape continues to be complicated and unpredictable, with the loss of a number of large grant giving bodies within the last twelve months. However, with a number of exciting projects on the horizon that

we know will appeal to these organisations, we are confident that we will see an increase in this funding stream in the next few years.

The fundraising team continues to work, not only to bring in income, but also to develop relationships with our considerate supporters and help demonstrate the value of each and every donation.

We continue to be extraordinarily grateful to everyone who has given us a gift of time or money during the last year.

Membership

We are incredibly grateful to our 23,144 members whose regular and reliable support provided 18% of our income this year. This reliable and growing income stream (up 3% from the previous year) gives us the certainty to make plans for wildlife and deliver core work in our priority landscapes, confident in the knowledge that we will be able to see them through. With the cost of living still increasing for many, we've been humbled by the members who have chosen to increase their monthly contribution or boost their support by signing up for Gift Aid.

Trusts and grants

Grant funding is a central pillar supporting both our projects and core work. In the past year we received income from 31 individual trusts, foundations and other grant-givers. These generous and important contributions delivered tree planting in the Mendips, eDNA beaver surveys, equipment and training for volunteers, and new equipment for reserves staff to name a few projects. They have also provided much needed ongoing support for our work in the Somerset Levels, along the River Tone, in the Blackdown and Polden Hills and have also funded new initiatives designed to connect schools, young people and those with health issues, to nature. We really are exceptionally grateful to each grant-giver who has supported us in the last year.



THERESA JONES

Fundraising Development Manager

Describe your job: I'm responsible for our members and our fundraising appeals – enthusing the public about the work we do, so that they know contributing will make a difference to the big picture.

What energises you in your job?: I'm from a fundraising background rather than a conservation background, so learning about the things the organisation is doing to make Somerset better for wildlife is fascinating.

What makes you proud to be at Somerset Wildlife Trust? Everybody who works here is passionate about what they do, and the what the organisation is achieving will truly make a difference for wildlife.

Community fundraising

Our community Fundraisers have continued to support the Trust in new, and often slightly crazy ways! We've seen a wide range of people of all ages taking on various challenges for wildlife this year. This has included people who have run, walked and cycled their way around Somerset, to the daredevils who have taken a leap and done our sponsored abseil. Our Wilder Open Gardens scheme has seen green-fingered heroes helping us create pockets of diversity for wildlife in their own spaces while raising valuable funds, and our recycling and digital card schemes have been raising money too to help fund our core activities.

These passionate people who raise money on our behalf have devoted their time to make a real difference to Somerset's wildlife and we're continually grateful for their commitment.

Major gifts

Philanthropic gifts are a cornerstone of our work for wildlife in Somerset. This year, gifts have supported a wide range of projects and work on reserves; including helping inspire young people to engage with nature whilst learning practical skills and ensuring the ongoing critical work to tackle invasive species. We have also received gifts which have supported Honeygar, our pioneering wilding site on the Levels, as well as contributing to our core running costs and the ongoing care of our nature reserves. All of these are amazing gifts from some incredibly passionate individuals. We are very lucky to have them supporting our work in so many ways and are genuinely inspired by the relationships we have developed over time with these special supporters.



Patron scheme

With biodiversity declining in all but a few protected sites plus the effects of climate change, our work is even more relevant today, hence the introduction of our Patron Scheme. Donations from our 60 Patrons, help us to create a bigger, better, more joined up nature recovery network across Somerset, helping to manage and restore our nature reserves for a diverse range of wildlife, and acting as catalysts for local communities and organisations to work together and stand up for nature in local policy and planning decisions. Their passion and influence is an inspiration to us and this year has been no different.

Patrons enjoy a close and special relationship with Somerset Wildlife Trust, meeting the people involved in our conservation delivery plans and getting a behind the scenes glimpse at some of our most vital work. Through exclusive invitations to events around the county and beyond, they get to see our work in progress as well as the end results, and have the opportunity to hear from our Chief Executive Officer at the annual Patrons' lunch to learn about our future plans, and give their thoughts and feedback on our work, as well as receiving regular bespoke updates of our work across the year.

We would like to thank all our Patrons for their generous support which is helping nature to recover across Somerset including all those who wish to remain anonymous.

"We had supported Somerset Wildlife Trust as members for many years and were therefore aware of the great work that they do across our region. We felt as though we should and could go further and became patrons because we are in the fortunate position to be able to commit a little more. However, doing so has also brought us closer to the Trust, enabling us to learn much more about their activities and the complex decisions that they often have to make. The events that they run for the patrons provide not only great opportunities to learn more about the natural world and its conservation, but they have also allowed us to spend time with the staff, including the CEO, giving us a greater feeling of connectedness and a chance to feed in our views."

Neil and Sarah Williams, Joint Patrons

REBECCA WALFORD

Head of Fundraising

Describe your job: I head up the Fundraising team, planning the long term strategy for income generation and cultivating relationship.

What energises you in your job? There's a real connection between the efforts of the fundraising team and the work we do, which really helps connect with our successes. I also get to work with genuinely brilliant and passionate people

What makes you proud to be at Somerset Wildlife Trust? Knowing that what we do is having a real impact on the work of the Trust, and seeing how the amazing donations we receive are helping support real changes for Somerset's wildlife and wild places.



Legacies

We are committed to making sure Somerset remains one of the most varied and wildlife-rich places to live, work and explore and will continue to protect wildlife, both now and in the future. We rely heavily on Gifts in Wills to make sure nature not only survives but thrives, and these donations, small or large, will help us create a greener and Wilder Somerset for future generations to experience and enjoy.

Amazingly, only 39% of people actually get round to writing a Will in their lifetime. This year, we were able to offer free will-writing services to our members and supporters, and provide a number of estate planning workshops to help people navigate the legal complexities involved.

In 2024/25 legacies contributed £538,000 funds which supported land restoration and species protection across Somerset, and we are extremely grateful to the 155 Wildlife Guardians who have made us aware they have pledged a gift in their Will to our future work.

“Having been members of Somerset Wildlife Trust for very many years and witnessed the brilliant conservation work they do, we feel the least we can do is to remember the Trust in our Wills. We hope that our gift will help the Trust continue their excellent work in safeguarding Somerset’s wildlife for future generations to enjoy.”

Mike and Angela Merrifield, Life Members and Wildlife Guardians.

“I wanted to contribute to a local cause close to my heart in my Will. I don’t have children, but my sister does. I truly hope there will be a world for them full of wildlife when they and their children, grow up.”

Rachel Underwood, Supporter and Wildlife Guardian.



MICHAEL WOODMAN Philanthropy Manager

Describe your job: Knowing that what we do is having a real impact on the work of the Trust, and seeing how the amazing donations we receive are helping support real changes for Somerset's wildlife and wild places.

What energises you in your job? Every time I step outdoors, I am reminded of

the importance of nature and the importance of the work being done at the Trust. This gives me a renewed energy for the work every day.

What makes you proud to be at Somerset Wildlife Trust? I am proud to work for an organisation that are so focussed and so committed to this wonderful part of the UK.





FINANCIAL REVIEW

It was a development year for the Trust with expenditure exceeding income by £467,000 (compared with a £222,000 surplus in 2023/24) as we invested in the delivery of the Wilder Somerset 2030 strategy. Whilst this meant total funds fell to £10.3 million from £10.7 million in 2023/24 the Trust maintains a positive and stable financial position with free financial reserves at the upper end of our target range.

Our total income grew by almost 10% to £5.3 million (£4.9 million: 2023/24). Conversely, expenditure increased by approximately 20% to £5.8 million (£4.7 million: 2023/24), importantly including £3.8 million (£3.4 million: 2023/24) spent specifically on our charitable activities. Notably, an exceptional provision of £376,000 has been recognised in the year representing the Trust's share of an additional liability due to a closure issue with the defined benefit section of the RSWT Wildlife Trusts Pension Scheme; however, the Trustees had already designated a cautionary financial reserve for this eventuality.

As a result of expenditure exceeding income our unrestricted funds fell by £473,000 (£400,000 surplus: 2023/24). This was offset by a small

increase in restricted funds of £6,000 (£178,000 reduction: 2023/24).

The Trust maintains a strong balance sheet with overall charity funds totalling £10.3 million (£10.7 million: 2023/24). This includes £7 million (£6.2 million: 2023/24) tangible and heritage fixed assets, £5.6 million (£4.8 million: 2023/24), of which are our nature reserves – the increase mainly relating to our strategic acquisition of 28 hectares of land at Sharpham Park, which will be restored for wildlife. The acquisition was made possible by a three-year interest free philanthropic loan. Net current assets remain stable at £3.7 million (£3.7 million: 2023/24).

We aim to hold between three and six months' core operating costs as free financial reserves which equates to between £0.9 million and £1.8 million. Despite the net cost recognised in the year free financial reserves are currently at the upper end of the target range and equate to just over 5 months' core operating costs. The financial reserves are reviewed regularly to ensure that the amount held remains adequate taking into consideration planned investment and future organisational growth.

Income

Income for the year grew to £5.3 million (£4.9 million: 2023/24) as a result of grant funding and the continued generosity of our members and supporters through membership, donations and gifts in wills.

Grant income totalled £2.1 million (£1.7 million: 2023/24) representing the largest source of income in the year and 39% of overall income. The most significant grants in the year included £226,000 from the National Lottery Heritage Fund for the Species Survival Fund project, £389,000 from DEFRA for the ELMS Landscape Recovery project and £347,000 for the Nature for Climate Peatland Grant Scheme. A total of £484,000 (£452,000: 2023/24) grants were received through agri-environment schemes, which specifically support the management of our nature reserves and represent 23% of total grant income.

Membership income grew to £919,000 (£890,000: 2023/24) and continues to be a significant and vital source of unrestricted income for the Trust representing the second largest source of income in the year and 18% of total income. The number of members also grew to 23,144 (22,692: 2023/24).

Income from donations and appeals totalled £702,000 (£875,000: 2023/24) representing the third largest source of income in the year. This included £335,000 philanthropic donations supporting a wide range of projects. A total of £111,000 was raised from appeals supporting Honeygar, community initiatives and supporting vital work on nature reserves.

Income from other trading activities totalled £677,000 (£634,000: 2023/24); this includes a 12% increase in external income achieved by the Trust's wholly owned subsidiary, SWT (Sales) Limited.

A total of £538,000 (£310,000: 2023/24) legacy income was recognised in the year from 34 generous bequests.

Investment income remained stable and totalled £126,000 (£132,000: 2023/24).

Expenditure

Overall expenditure increased to £5.8 million (£4.7 million: 2023/24) due to planned growth, with 66% spent on charitable activities.

Staff costs continue to be the majority of overall expenditure, representing 54% of the total expenditure at £3.1 million (£2.7 million: 2023/24). Our average staff numbers increased from 87 to 93 as a result of new grant funded projects and planned growth to deliver our ambitious strategy.

Nature recovery expenditure increased by 38% and totalled £1.8 million (£1.3 million: 2023/24), as a result of significant grant funded projects and further expenditure on Honeygar.

A total of £1 million (£993,000: 2023/24) was invested in management and improvement works on our land, including nature reserves, in the year.

Expenditure on developing our movement for nature, Team Wilder, totalled £811,000 (£888,000: 2023/24), a small reduction compared to the previous year due to the completion of certain grant funded projects in 2023/24.

Expenditure on raising funds increased by 28% and totalled £807,000 (£630,000: 2023/24) primarily as a result of the creation of new staff roles to support future unrestricted income growth and long-term financial stability.

Support costs increased by 18% to £899,000 (£764,000: 2023/24), as a result of planned investment in the infrastructure of the charity. Despite the increase in expenditure support costs continue to represent the same proportion of overall expenditure at 16% (16%: 2023/24).

SWT (Sales) Ltd

As a result of operational changes with a focus on improved efficiencies in our wholly owned subsidiary, SWT (Sales) Limited, both income and expenditure increased; and, encouragingly, the company returned to profit, delivering a surplus of £87,000 (£8,000 loss: 2023/24) which has been Gift Aided to the Trust.

Investments

We have an ethical investment policy that ensures our investment portfolio consists of stocks consistent with the Trust’s values. The Trust’s ethical investment policy seeks to encourage investment in companies with strong sustainability policies and practices that respect and protect wildlife, communities and their wider environment. The value of the Trust’s investment portfolio totalled £799,000 (£847,000: 2023/24), a reduction compared to 2023/24 due to global market turbulence, particularly in the first quarter of 2025. Investment income totalled £16,000 (£25,000: 2023/24). The Trust recognised a £42,000 loss (£18,000 gain: 2023/24) arising from revaluations in the year. The Finance, Audit and Risk Committee regularly review the performance of the investment portfolio and are satisfied that the reduction in value is consistent with market conditions and current investment strategy. Investment outcomes will continue to be monitored regularly.

Financial reserves

The Trust’s free financial reserves amount to £1,630,000 (£1,763,000: 2023/24) and represent just over 5 months’ core operating costs.

The Trust has a policy of holding reserves of funds to:

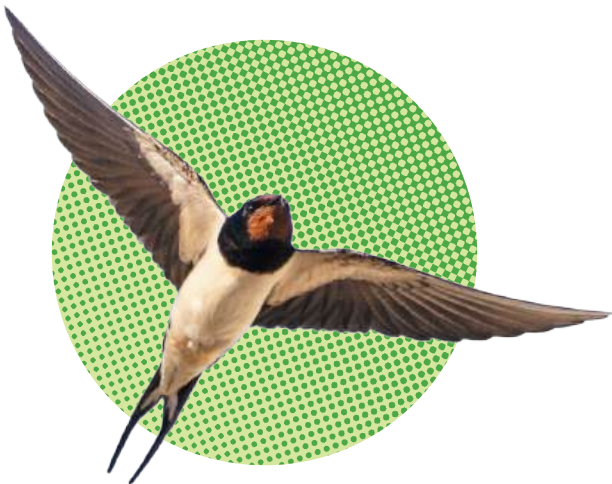
- Enable it to take advantage of unanticipated opportunities to further the aims of the Trust when no other source of income is available.
- Provide adequate working capital to carry out projects for which funds have been granted by external bodies, but for which those funds are payable only after expenditure has been incurred.
- Provide a reserve to cover contractual obligations and short-term payment of essential costs, such as staff salaries, in the event of an unanticipated shortfall in funds and/or fluctuations in income.
- Meet any legal obligation on the Trust to meet any future costs.

Total reserves at the end of the year totalled £10.3 million (£10.7 million: 2023/24). A significant proportion of this total is represented by tangible and heritage (land) fixed assets, restricted funds and designated funds leaving free financial reserves of £1.63 million (£1.76 million: 2023/24).

Total reserves	£10,269,000
Less:	
Tangible and heritage fixed assets	(£6,990,000)
Restricted funds	(£1,520,000)
Designated funds	(£129,000)
Free financial reserves	£1,630,000

Target free financial reserves range £900,000 - £1,800,000

In accordance with the financial reserves policy, the Trust aims to hold between three and six months’ core operating costs as free financial reserves which equates to between £900,000 and £1,800,000. Free financial reserves held in the income fund are currently within with the target range and equate to just over 5 months’ core operating costs.





OBJECTIVES AND ACTIVITIES

Charitable purpose

Somerset Wildlife Trust is set up to achieve three charitable objects:

1 For the benefit of the public, to advance, promote and further the conservation, maintenance, protection and enjoyment of wildlife and its habitats, including places of botanical, geographical, zoological, archaeological or scientific interest and places of natural beauty;

2 To advance the education of the public in the principles of biodiversity conservation and of sustainable development;

3 To promote research in all branches of ecology and geology. The Trust delivers its charitable purposes through its strategic objectives as described in this report.

The Trust delivers its charitable purposes through its work to implement the strategic objectives as described in this report. The Trust, through the Executive and Council, monitor and review our work and progress through:

- Quarterly Council meetings and supporting Committee meetings which include performance against annual budget and progress in respect of key strategic initiatives and projects.
- Regular interaction with all members of the Executive Team and in particular the CEO as well as field visits to existing reserves and potential acquisitions.
- Participation by Trustees, Executive and staff in various RSWT Communities of Practice and Working Groups to learn and share best practice and resources. The Executive and SLT work in close association with the Wildlife Trusts within the SW Region.
- Engagement with third parties including partners, major donors and other Wildlife Trusts.
- Qualitative feedback from members, supporters, volunteers and staff including through an annual staff survey and annual volunteer engagement event.
- The quality of relationships with partner organisations, funders and neighbours.
- Hosting Somerset Environmental Records Centre (SERC), which collects and provides data on species and habitats across Somerset, including on Trust nature reserves, to external parties, the public and specialist groups
- Annual endorsement from Members of the report and accounts and future plans at the Annual General Meeting.
- Monitoring and reporting on complaints received.



Public benefit

The Trustees confirm that they have complied with the duty in section 17 of the Charities Act 2011 to have due regard to public benefit guidance published by the Charity Commission. The Trust's public benefit is enshrined in its charitable objectives and activities – providing multiple benefits for the public which are wide-ranging and longstanding.

Restoring nature at landscape-scale

The Trust's work aims to restore nature at scale across our landscapes including by restoring, creating and protecting habitats to achieve increased biodiversity and bioabundance. We have defined four priority landscapes where we will focus our primary efforts - Somerset Levels & Moors, Mendip Hills, Tone Vale and Somerset's Coast. We will continue to work across the County but consider focus is needed to be more effective in reducing habitat fragmentation within our landscapes.

There is continuing discussion on how we can engage in, and enable, development of 'ecosystem services' which offer public benefit in addition to nature restoration; for example: flood risk management, carbon storage, pollination, pollution control, improved health and wellbeing and aesthetic beauty. Legislation to drive adoption of new mechanisms has not progressed as fast as we hoped but remains under discussion in government.

Land management advice for nature

Through providing advice and assistance to farmers and landowners to manage their land for the benefit of wildlife, the Trust helps to support the rural economy, the countryside and landscapes that are enjoyed and valued by the wider public.

Nature reserves

The Trust's 66 nature reserves, located throughout Somerset, are used extensively by the public for quiet recreation; many have access on clearly marked paths along with information and interpretation for visitors and visiting helps to build connection with nature and supporting health and wellbeing. We have worked in improved accessibility this year (see pages xx)

Team Wilder – a movement for nature

Team Wilder is supporting people, communities and organisations across Somerset to take action for nature to help us restore, create and protect habitats and build their connection with nature. We are committed to being an inclusive organisation and are actively working to determine how we can be most effective through our engagement work.

Research

Evidence and advice is provided by the Trust to local authorities, landowners and communities with a view to improve decisions on policies such as land management, development, health and wellbeing take full account of the public benefit of wildlife and a healthy environment.



A Development Year

Council and Executive committed to make 2024/5 a “development year”. This meant we have invested in the organisation so we are able to step up our work to deliver our strategic goals going forward. Our recruitment of three new Executive Directors has allowed us to establish stronger, clearer working practices and under their lead, develop our “Theory of Change” model which cascades through to staff performance goals. This has all been done so we can be more efficient and focused on prioritising our work for best impact; and more nimble and adaptable to be able to take opportunities when they arise. This investment has been achieved alongside maintaining all our planned delivery work. We will continue to make operational improvements to enable us to be as effective as possible in pursuit of our goals.

Looking ahead

In 2025/6 we will, in line with other Wildlife Trusts, complete a mid way review of our strategic plan and refresh of our delivery plan. Much has changed since 2020 and we want to learn from what has worked well, and not so well. While we expect to adjust aspects of our priorities and approach, our commitment to our strategic goals: creating more space for nature, inspiring a movement for nature and telling Somerset’s story, will remain.

Reporting our Impact

Our work to establish performance measures to explain our impact against our strategic goals has continued. We are introducing a number of key indicators for internal use. We aim to achieve a concise set of core Impact Measures to provide meaningful and reliable transparency to our Members and other stakeholders. We want to ensure the Measures we report provide the key insights and enable trend comparison over time. This is work in progress and will form part of our strategic refresh.

We continue to work as part of the national Wildlife Trusts working group benefitting from specialist input. The Defra/Natural England guidance on land which can be included as “managed positively for nature”. It is consistent with the WCL (Wildlife and Countryside Link) which in turn had taken the spirit of the Kunming-Montreal Framework which we had followed. As the custodians of valuable data within Somerset Environmental Record Centre we want to be able to track trends of change, both positive and negative, for the quality, quantity, distribution, connectivity and resilience of our habitats within the wider nature recovery network, alongside the resilience of those habitats.

We want the State of Nature Report to be effective in influencing decision making, not just our own but also the decisions of other organisations and individuals across Somerset.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Structure

Somerset Wildlife Trust is a company limited by guarantee and a registered charity governed by its Articles of Association.

Somerset Wildlife Trust is one of 46 independent Wildlife Trusts working together as a federated movement known as The Wildlife Trusts, covering the UK and Crown Territories. The Royal Society of Wildlife Trusts' role, one of the 46, is defined by the Royal Charter to support The Wildlife Trusts.

Somerset Wildlife Trust has one wholly owned subsidiary, SWT (Sales) Limited. The charity owns 100% of the company's ordinary share capital. The principal activities of SWT (Sales) Limited are that of overseeing the environmental consultancy, trading under the name Somerset Wildlife Trust Consultancy, previously First Ecology.

It is based at the Trust's Callow Rock Offices. SWTC trades under SWT (Sales) Ltd and is a company limited by shares and registered in England No. 1317396.

Somerset Environmental Records Centre (SERC) was established in 1986 and is a partnership hosted by Somerset Wildlife Trust, funded in part through service level agreements (SLAs) with a number of organisations including Somerset Council, Wessex Water and the Environment Agency. The core work of SERC is to gather, manage, supply and analyse biological and geological data and hold the county list of sites recognised for their natural value. Data gathered by SERC is used to build up a comprehensive picture of the biodiversity and geodiversity of Somerset, and help to monitor the state of the natural environment. SERC is a member of the Association of Local Environmental Records Centres and has close links to the National Biodiversity Network, and the National Federation of Biological Recorders.

South West Wildlife Fundraising Limited (SWWFL) is an Associate trading subsidiary (set up for mutual trading) and jointly owned by eight Wildlife Trusts, including Somerset Wildlife Trust, to help secure regular financial support through memberships recruited face to face. SWWFL provides membership recruitment services for Somerset, Avon, Cornwall, Devon, Dorset, Hampshire and Isle of Wight, Herefordshire, Gloucestershire, Gwent, Wiltshire and Worcestershire Wildlife Trusts.

Governance

COUNCIL

Members elected to serve on Council have a dual role as a Trustee of the Charity and a Director of the company. There can be no fewer than eight and no more than 12 Trustees. All members of Council are volunteers, give freely of their time and have no beneficial interest in the charity. Trustees are elected by the members at the Annual General Meeting and serve for an initial three-year term. Each Trustee can serve for three consecutive terms of three years subject to re-election at the end of each three-year term. The Chair, Vice-Chair and Treasurer are elected by Council following the AGM and are re-elected for one-year terms.

Each new Council member receives an induction into the work and administration of the charity. Council members receive regular updates on the work of the Trust and any training deemed necessary to enable members to carry out their responsibilities. The Council meets quarterly.

At the Trust AGM in November 2024, two Trustees ended their terms. Their replacements are being sought.

Council is assisted by Standing Committees which meet quarterly unless otherwise stated



COMMITTEES

Finance, Audit and Risk

Committee: Monitor financial management including policies and controls, act as Audit Committee, make recommendations to Council on financial policy and capital investment decisions and monitor our risk framework.

People, Culture & Resources

Committee: Oversight of policies and key controls relating to the recruitment, development and wellbeing of staff and volunteers and monitoring of our responsiveness to Members feedback. Monitors our safeguarding policies and response and delivery of equality, diversity and inclusion.

Health and Safety Committee:

Oversight on all health and safety matters in the Trust and subsidiary reviews of risk assessments and control frameworks.

Remuneration Committee:

Consider and make recommendations on the annual salary review for the Chief Executive Officer and Directors, remuneration policy and benchmarking and discretionary pay increases.

Governance Committee (biannual):

Consists of the Chair of Council, the Chairs of each of the Standing Committees and the CEO; it considers overall governance for the Trust in the context of the Charitable and strategic objectives of the Trust and the risks and uncertainties therein; developments in the legal or regulatory framework, including the Charity Governance Code, and the effectiveness of Council. During this year to improve efficiency it has taken responsibility for Nominations. A Skills Audit of Trustees has been completed to enable improved

identification of short and longer term skill needs.

Risk management

During the year, and with the help of one of Trustees, who is a risk management specialist, we have taken steps to improve and strengthen our risk management systems and processes.

Work to embed our risk management processes is ongoing but some key milestones have been met. We have:

- ▶ Upgraded the risk management framework and integration into business planning processes;
- ▶ Improved the definition and segregation of strategic and operational risks;
- ▶ Reviewed and refreshed our risk appetite in light of our strategic goals and external factors;
- ▶ Integrated risk into the planning of all major projects.

The Trust will continue to improve its capability to manage risks proportionately in its day-to-day operations, and further steps are planned to embed risk understanding and transparency across the organisation.

Strengthening our risk management processes is key to enabling us to be take the right risks at the

right time for the opportunities they create. Our risk tolerance is underpinned by ensuring our financial reserves are always above our policy threshold.

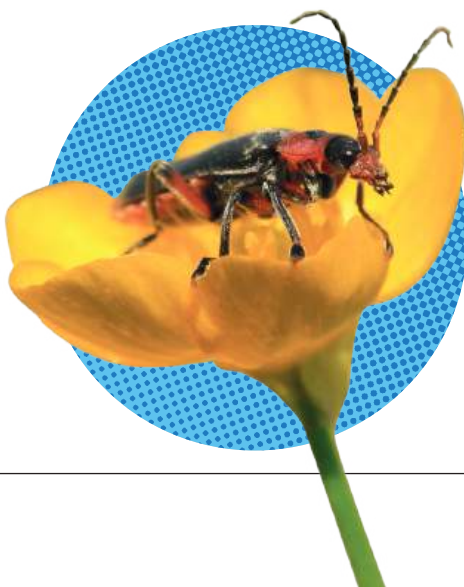
Some levels and types of risk are more acceptable than others. We are not prepared to take any level of undue risk in respect of governance, compliance, financial security, protecting our people and ensuring biodiversity success on our Reserves and wider land holdings. To make meaningful progress towards our strategic aims however we must be prepared to take some higher levels of risk to realise new opportunities; in particular to find new, expanded income streams and work in new ways across land and landscapes which are not within our ownership.

Principal risks and uncertainties

During 2024/25 we had particular focus towards:

▶ **External environment and conditions:** economic drivers, political shifts and market uncertainties necessitated heightened short-term focus to ensure sustained progress towards our strategic goals. Looking forward we will continue to adapt to changing external conditions in what we do and how we work. We are improving our adaptability and agility to find the most effective ways to progress, recognising this external uncertainty is likely to sustain for several years.

▶ **Funding diversification and step change:** we have built a strong financial position and are fortunate to have generous donors. However, new “green finance” opportunities have not developed nationally and within Somerset as fast as we hoped. Whilst we have access to government funding for reserves, looking ahead there is



greater uncertainty over the level of government funding which will be accessible to us especially during 2025/26. We are instigating strategic planning to identify new substantive income opportunities for next year and beyond; this will be essential to enable meaningful progress towards our strategic goals.

► **Delivery at landscape scale:**

new partnerships and delivery approaches are needed to achieve change at the pace and scale needed. We continue to find ways to buy strategically important land to protect for nature. We are exploring ways of working with others to achieve meaningful and sustained influence for nature over land that is not within our ownership.

► **Health, safety and wellbeing**

(including safeguarding): a constant priority risk area, recognising our responsibilities to our people, members, and public. No significant incidents have occurred in the year.

► **Staff satisfaction and resilience:**

we are embedding change following our growth in staff numbers and improving internal elements of how we work. Staff satisfaction and loyalty are at a positive level, but we recognise that we must continue to work hard on internal communications and transparency and ensure our people are happy, supported and effective.

Transactions involving Council members and related parties

During 2024/25 a total of £1,000 (2024: £1,000) was received from Trustees in respect of donations and membership.

Strategy and policy setting

Council is responsible for ensuring the work of SWT delivers against the objectives of the Trust as set out in the Articles of Association.

Council determines the strategic direction of the Trust through the 10-year Wilder Somerset 2030 strategy which was formally launched in May 2021. The strategy is available to download from the Trust's website.

The focus of Council's ongoing work is: supervising the strategic fit of key decisions including investments and plans for diversification of activities; monitoring delivery; and ensuring the income and expenditure of the Trust and its property and assets are managed appropriately. The Council always seeks to maintain a short term and longer term focus on the Trust's need to achieve resilient business models that are capable of sustaining nature protection and enhancement.

Staffing and remuneration

Council appoints the Chief Executive Officer and supports the appointment process for senior staff. Trustees delegate to the Chief Executive Officer and Senior Leadership Team through agreement of clear strategic objectives for the Trust which have demonstrable outcomes for wildlife in the county. Trustees monitor progress quarterly as well as ensuring that the Trust's financial affairs are managed appropriately.

The Chief Executive Officer

reports to the Chair of Trustees. The Chief Executive Officer is responsible for the day to day running of the Trust and has delegated powers of authority approved by the Council. The Chief Executive Officer delegates decision-making powers through the Executive and Senior Leadership Team.

During the year the Trust employed 79 full-time equivalent staff (2024: 75) 3 of which worked for SERC and 9 for SWT (Sales) Ltd. The Trust continues to adopt hybrid working, with many staff working primarily from their homes or elsewhere to deliver projects and manage nature reserves, balanced with attendance at the Trust's offices and staff meetings as appropriate.

The Trust's headquarters is in Taunton with other staff based at Ford Farm, the Avalon Marshes Centre and Callow Rock. The staff are organised into functional teams, such as reserves, and also work in cross-functional teams, such as for delivering major projects.

All job descriptions are graded by the Salary Grading Panel. The corresponding salary band which is benchmarked against similar roles in the external market and other Wildlife Trusts.

The pay arrangements for the Executive Directors are determined by the Chief Executive Officer and approved by the Remuneration Committee and Council using external and Wildlife Trusts' benchmarking. The Chief Executive Officer's salary is recommended to Council by the Remuneration Committee and approved by Council.



Key matters

Complaints

The Trust treats all complaints seriously. In the year 2024/25 the Trust received 3 complaints (2023/24: 3). 0 complaints were received in 2024/25 about our fundraising (2023/24: 0).

All complaints were responded to within seven days. Complaints are individually reviewed by the relevant Executive and monitored by the Chief Executive Officer. Formalised reporting to Council will commence in 2025/26.

How we fundraise

As a charity, fundraising is essential to Somerset Wildlife Trust's ability to meet our core purpose and deliver public benefit. We receive most of our financial support from grants and individuals, including our members.

We are committed to a transparent and ethical approach to all our fundraising activity. We make every effort to ensure that our fundraising activity never feels unreasonably intrusive, persistent or pressurised, but rather focuses on inspiring support and celebrating the impact of fundraised income.

Our members and supporters are the foundation of everything we do and our work is only possible thanks to their generosity and their commitment to take action locally for nature.

We do:

- ▶ recruit new members face to face at venues and events across Somerset, including Trust nature reserves, and via our website (including as part of national Wildlife Trust campaigns), telephone and occasional targeted door drops;
- ▶ send appeal letters and other fundraising communications to selected supporters who have opted-in to marketing by post and/or digitally;
- ▶ seek philanthropic support from major donors, patrons, trusts, foundations, companies and other grant givers;
- ▶ invite donations via our website, other giving platforms and collection boxes;
- ▶ promote the importance of supporting our work, including via gifts in wills and gifts in memory;
- ▶ organise online fundraising auctions and other fundraising events; and
- ▶ encourage our members, supporters and local businesses to fundraise in aid of our work (community fundraising) as part of taking action for nature -

We do not:

- ▶ sell or pass on supporter details to any other organisation or buy lists of other charities' donors.

Our members and supporters have the opportunity to express their preferences on how they are contacted and can change these at any time, by contacting us.

We are registered with the Fundraising Regulator and committed to follow its Code of Practice, which sets out standards of behaviour of fundraisers.

We are signed up to the Fundraising Preference Service to enable individuals to opt out from receiving fundraising communications from us and received no requests from this service to opt out in the year.

We ensure that fundraising is conducted to the highest quality and that individuals who may be in vulnerable circumstances are protected, including by continually updating our database to prevent communications being sent to any vulnerable people who have been identified.

Our fundraising is mainly carried out by Trust staff with support from a very limited number of carefully selected professional fundraisers which are fundraising agencies or third-party service providers which act as agents in raising funds on the charity's behalf.

Face to face fundraising at venues and events is conducted on our behalf by staff of South West Wildlife Fundraising Limited (SWWFL), an associate trading subsidiary jointly owned by Somerset Wildlife Trust and seven other Wildlife Trusts. SWWFL





is a corporate member of the Chartered Institute of Fundraising which conduct 'mystery shopping' surveys with SWWFL's face-to-face fundraisers to monitor quality.

We seek feedback from all new members. To save costs, we ceased to use a third-party service to do this and now collect this feedback through a new member email joining journey, which includes a questionnaire covering aspects of membership recruitment.

Health and safety

The Health and Safety Committee meets quarterly and presents reporting to Council. The health and safety of employees, contractors, volunteers and members of the general public are of paramount importance to the Trust. Accidents are recorded, there were 11 involving staff (2023/24: 3), 2 involving volunteers (2023/24: 4) and 0 contractor injury (2023/24: 1) causing lost time. We are disappointed that the number of accidents involving staff increased. The Health and Safety Committee will have revised terms in 2025/6 with increased focus to accident avoidance and prevention. Causes included machine use and working practices. Each accident is reviewed and steps taken to reduce risk of recurrence including, as applicable: altered procedures, equipment review and training.

Safeguarding

As an organisation that works with children and vulnerable adults, the Trust acknowledges its duty of care to safeguard and promote the welfare of children and vulnerable adults. We are committed to ensuring our safeguarding practice reflects statutory responsibilities,

government guidance and complies with best practice and regulatory requirements wherever we operate as a charity. Our safeguarding policy is published on our website at www.somersetwildlife/policies/safeguarding.

Equality, Diversity and Inclusion

The Trust is committed to being inclusive in all aspects of our work from staff to trustees, volunteers to participants at our events. By recognising, respecting and valuing differences, and adopting more diverse perspectives, our staff, trustees, volunteers and supporters can become more effective ambassadors for nature as they can reach wider audiences. As such, equality, diversity and inclusion are enshrined in our core values, our Wilder Somerset 2030 strategy, our policies and activities.

This year we progressed implementing our EDI action plan. The plan provides a framework for the delivery of EDI in support of the Trust's strategy. It places diversity and inclusion at the heart of our culture.

Carbon impact

The Trust has committed to be a Net-Zero Carbon organisation by 2030 and to do this will mitigate its climate impacts (such as buildings,

staff transport, landholdings, purchasing and waste). Our landholdings are our major sources, including cattle grazing and we have researched this area in detail to understand the implications for us. Carbon release from dried out peat, as on Honeygar, is a key area of focus for us and we do detailed research into the impact of holding water on peat to lock in the carbon and avoid emissions. We are working with The Wildlife Trusts on annual carbon reporting which will be published in the future.

The Trust is using the Wilder Carbon process developed by Kent Wildlife Trust to ensure we can benchmark accurately with other Wildlife Trusts and measure our footprint and sequestration using the best available data and emission factors recommended by DEFRA/ Natural England.

A Climate and Nature Emergency Working Group of key staff monitors our progress towards net-zero and the Trust's carbon footprint is measured each year.

Environment Policy

Our Environment Policy considers the direct impacts of all our activities including our built properties, landholding and reserves management, purchasing and transport. The Policy is available on our website.

The Trustees' Report, including the Strategic Report, was approved by the Trustees on 17 July 2025 and signed on their behalf by:



Rupert Taylor
Chair



STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees (who are also directors of Somerset Wildlife Trust for the purposes of company law) are responsible for preparing the Strategic Report, Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards including Financial Reporting Standard 102; the Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

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 charitable company and the group and of the income and expenditure of the charitable group for that period. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The Trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and the group and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- there is no relevant audit information of which the charitable company's auditors are unaware, and
- the Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

The Trustees' Report, including the Strategic Report, was approved by the Trustees on 17 July 2025 and signed on their behalf by:



Rupert Taylor
Chair



PART 4:

A decorative double underline consisting of two parallel white lines that extend from the left edge of the text and taper off to the right.

Independent
auditor's report





INDEPENDENT AUDITOR'S REPORT

to the Members of Somerset Wildlife Trust

Opinion

We have audited the financial statements of Somerset Wildlife (the 'parent charitable company') and its subsidiary (the 'group') for the year ended 31 March 2025, which comprise the consolidated Statement of Financial Activities, the consolidated and parent charitable company Balance Sheets, the consolidated Statement of Cash Flows, and Notes to the Financial Statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the group's and of the parent charitable company's

affairs as at 31 March 2025 and of the group's incoming resources and application of resources for the year then ended;

- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the group in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these

requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustee's use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the entity's ability to continue as a going concern for a period of at least 12 months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the directors with respect to going concern are described in the relevant sections of this report.



Other information

The trustees are responsible for the other information. The other information comprises the information included in the Annual Report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work

we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinion on other matter prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

the information given in the Annual Report, which includes the Directors' Report and Strategic Report prepared for the purposes of company law for the financial year for which the financial statements are prepared is consistent with the financial statements; and

the Directors' Report and the Strategic Report included within the Annual Report have been prepared in accordance with applicable legal requirements.

In the light of the knowledge and understanding of the group and parent charitable company and their environment obtained in the

course of the audit, we have not identified material misstatements in the Directors' Report and Strategic Report included within the Annual Report.

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters where the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept by the parent charitable company, or returns adequate for our audit have not been received from branches not visited by us; or
- the parent charitable company financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit.

Responsibilities of trustees

As explained more fully in the Statement of Trustees' Responsibilities, the trustees (who are also the directors of the parent charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the group's and parent charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the group or charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs

(UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

The extent to which the audit was considered capable of detecting irregularities including fraud

Our approach to identifying and assessing the risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, was as follows:

- the engagement partner ensured that the engagement team collectively had the appropriate competence, capabilities and skills to identify or recognise non-compliance with applicable laws and regulations;
- we identified the laws and regulations applicable to the company through discussions with management, and from our commercial knowledge and experience of the charity sector;
- we focused on specific laws and regulations which we considered may have a direct material effect on the financial statements or the operations of the company, including the Companies Act 2006, Charity Act 2011, and employment legislation;
- we assessed the extent of compliance with the laws and regulations identified above through making enquiries of management and considering legal correspondence; and
- identified laws and regulations were communicated within the audit team regularly and the team remained alert to instances of non-compliance throughout the audit.

We assessed the susceptibility of the group's financial statements to material misstatement, including obtaining an understanding of how fraud might occur, by:

- making enquiries of management as to where they considered there was susceptibility to fraud, their knowledge of actual, suspected and alleged fraud; and



- considering the internal controls in place to mitigate risks of fraud and non-compliance with laws and regulations.

To address the risk of fraud through management bias and override of controls, we:

- performed analytical procedures to identify any unusual or unexpected relationships;
- tested journal entries to identify unusual transactions;
- assessed whether judgements and assumptions made in determining the accounting estimates were indicative of potential bias; and
- investigated the rationale behind significant or unusual transactions.

In response to the risk of irregularities and non-compliance with laws and regulations, we designed procedures which included, but were not limited to:

- agreeing financial statement disclosures to underlying supporting documentation;
- reading the minutes of meetings of those charged with governance;
- enquiring of management as to actual and potential litigation, claims and breaches of relevant legislation; and
- reviewing correspondence with the Charity Commission and other relevant regulators.

There are inherent limitations in our audit procedures described above. The more removed that laws

and regulations are from financial transactions, the less likely it is that we would become aware of non-compliance. Auditing standards also limit the audit procedures required to identify non-compliance with laws and regulations to enquiry of the directors and other management and the inspection of regulatory and legal correspondence, if any.

Material misstatements that arise due to fraud can be harder to detect than those that arise from error as they may involve deliberate concealment or collusion.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the group and parent charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the group and parent charitable company's members and trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the group and parent charitable company and the group and parent charitable company's members as a body and the parent charitable company's trustees as a body, for our audit work, for this report, or for the opinions we have formed.



.....
Michelle Ferris BSC (Hons) FCA
DChA (Senior Statutory Auditor)
For and on behalf of Albert
Goodman LLP, Statutory Auditor

Goodwood House
Blackbrook Park Avenue
Taunton
Somerset
TA1 2PX

Date: 24 July 2025



PART 5:

Financial statements

- ▶ Consolidated statement of financial activities for the year ended 31 March 2025
- ▶ Consolidated and Trust balance sheets as at 31 March 2025
- ▶ Consolidated statement of cash flows for the year ended 31 March 2025
- ▶ Notes forming part of the financial statements for the year ended 31 March 2025



CONSOLIDATED STATEMENT OF FINANCIAL ACTIVITIES

(Including consolidated income and expenditure account)

For the year ended 31 March 2025

		Unrestricted Funds		Restricted Funds	Endowment Funds	Total Funds 2025	Total Funds 2024
	Notes	General £'000	Designated £'000	£'000	£'000	£'000	£'000
Income from:							
Membership, donations and legacies	2	1,649	-	510	-	2,159	2,075
Charitable activities:							
More space for nature - nature recovery	3	88	-	1,276	-	1,364	965
More space for nature - nature reserves	3	463	-	51	-	514	585
A movement for nature – Team Wilder	3	-	-	283	-	283	293
Telling Somerset's story – Somerset Environmental Records Centre	3	195	-	30	-	225	221
Other trading activities (including SWT (Sales) Ltd)	4	677	-	-	-	677	634
Investments	5	126	-	-	-	126	132
Total		3,198	-	2,150	-	5,348	4,905
Expenditure on:							
Raising funds:							
Cost of raising funds	6	372	-	-	-	372	327
Membership recruitment and retention	6	425	-	-	-	425	296
Merchandising costs	6	2	-	-	-	2	2
Investment management fees	6	8	-	-	-	8	5
SWT (Sales) Ltd	6	764	-	-	-	764	650
Charitable activities:							
More space for nature - nature recovery	6	15	23	1,718	-	1,756	1,297
More space for nature - nature reserves	6	853	78	133	-	1,064	993
A movement for nature – Team Wilder	6	548	-	263	-	811	888
Telling Somerset's story – Somerset Environmental Records Centre	6	165	-	30	-	195	243
Provision for pension scheme liability	17	-	376	-	-	376	-
Total		3,152	477	2,144	-	5,773	4,701
Net (loss)/gain on investments		(42)	-	-	-	(42)	18
Net (expenditure)/income		4	(477)	6	-	(467)	222
Transfers between funds	21	(134)	134	-	-	-	-
Net movement in funds		(130)	(343)	6	-	(467)	222
Reconciliation of funds							
Fund balances brought forward at 1 April 2024		2,217	3,932	1,514	3,073	10,736	10,514
Fund balances carried forward at 31 March 2025		2,087	3,589	1,520	3,073	10,269	10,736

All of the above results are derived from continuing activities. All gains and losses recognised in the year are included above. The notes on pages 86 to 101 form part of these financial statements.

CONSOLIDATED AND TRUST BALANCE SHEETS

As at 31 March 2025

	Notes	Group		Charity	
		2025 £'000	2024 £'000	2025 £'000	2024 £'000
Fixed assets					
Tangible assets	11	1,393	1,413	1,373	1,391
Heritage assets	11	5,597	4,788	5,597	4,788
Investments	12	799	847	799	847
		7,789	7,048	7,769	7,026
Current assets					
Stock	13	1	1	1	1
Debtors	14	1,677	1,575	1,704	1,625
Deposit accounts		1,901	2,299	1,901	2,299
Cash at bank and in hand		482	290	464	259
		4,061	4,165	4,070	4,184
Liabilities					
Creditors: amounts falling due within one year	15	395	477	384	465
Net current assets		3,666	3,688	3,686	3,719
Creditors: amounts falling due after more than one year	16	810	-	810	-
Provisions for liabilities	17	376	-	376	-
Total net assets		10,269	10,736	10,269	10,745
The funds of the charity					
Endowment funds		3,073	3,073	3,073	3,073
Restricted funds		1,520	1,514	1,520	1,514
Designated funds		3,589	3,932	3,589	3,932
Unrestricted funds		2,087	2,217	2,087	2,226
Total charity funds	20	10,269	10,736	10,269	10,745

The notes on pages 86 to 101 form part of these financial statements.

The financial statements on pages 82 to 101 were approved by the Trustees on 17 July 2025 and signed on their behalf by:



Rupert Taylor
Chair



Stephen Rogers
Treasurer

Somerset Wildlife Trust
Registered company number 818162

CONSOLIDATED STATEMENT OF CASH FLOWS

For the year ended 31 March 2025

	Note	2025 £'000	2024 £'000
Cash flows from operating activities:			
Net cash provided by operating activities	24	590	(11)
Cash flows from investing activities:			
Dividends, interest and rental income		126	132
Proceeds from the sale of property, plant and equipment		10	16
Purchase of property, plant and equipment		(937)	(403)
Proceeds from sale of investments		109	142
Purchase of investments		(131)	(116)
Net cash used in investing activities		(823)	(229)
Change in cash and cash equivalents in the reporting period		(233)	(240)
Cash and cash equivalents at the beginning of the reporting period		2,625	2,865
Cash and cash equivalents at the end of the reporting period	25	2,392	2,625

The notes on pages 86 to 101 form part of these financial statements.



NOTES FORMING PART OF THE FINANCIAL STATEMENTS

For the year ended 31 March 2025

1. ACCOUNTING POLICIES

(a) Charitable company status

The Charity is a company limited by guarantee and does not have any share capital. The liability of the guarantors, who are the members, is limited to £1 per guarantor. At 31 March 2025 the charity had 23,144 members. The Company is registered in England and Wales. The registered office address is 34 Wellington Road, Taunton, Somerset, TA1 5AW. On behalf of the members, the Council controls the Company.

(b) Basis of preparation

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice (SORP) 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) – (Charities SORP (FRS 102) 2019 the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

The financial statements have been prepared under the historic cost convention with the exception of listed investments which are included at their fair value.

The Trust meets the definition of a public benefit entity under FRS 102.

(c) Preparation of the accounts on a going concern basis

The Trustees consider that there are no material uncertainties about the Trust's ability to continue as a going concern.

(d) Group financial statements

The financial statements consolidate the results of the Charity and its wholly owned subsidiary SWT (Sales) Limited on a line-by-line basis. A separate Statement

of Financial Activities and Income and Expenditure Account for the Charity has not been presented because the Trust has taken advantage of the exemption afforded by section 408 of the Companies Act 2006. The deficit in the year for the Charity was £467,000 (2024: surplus £222,000). Note 23 gives full details of the results of the subsidiary undertaking for the year to 31 March 2025.

(e) Fund accounting

Unrestricted funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity. Certain unrestricted funds have been designated by the Trustees for specific purposes.

Designated funds

Designated funds are unrestricted funds that have been set aside by Council for a specific purpose.

Restricted funds

Restricted funds are funds that are used in accordance with specific restrictions imposed by donors or which have been raised by the Charity for particular purposes.

Endowment funds

The nature reserves endowment fund represents amounts received specifically for, and expended on, the purchase of nature reserves.

(f) Income

All income is included in the Statement of Financial Activities (SOFA) when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy.

Income for works that have been completed but has not yet been received is included as accrued income. The stage of completion is determined by comparing the services rendered to date to the accepted quotation or contract.

For legacies, entitlement is taken as the earlier of the date on which either: the Charity is aware that probate has been granted, notification has been made by the executor(s) to the Trust that a distribution will be made, and the amount of that distribution can be estimated with sufficient accuracy; or when a distribution is received from the estate.

Grants are included in the SOFA in the year they are receivable and when any performance conditions attached to the grant have been met.

Income from investments and from rental income is included in the SOFA in the year it is receivable.

The total income receivable in respect of membership subscriptions is included as income within note 2. Income from life membership is included in the SOFA in the year in which it is receivable.

Gifts in kind are included in the SOFA at their estimated current value in the year in which they are receivable.

Trading income is included in the SOFA in the year in which it is receivable.

(g) Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the Charity to that expenditure, it is probable that settlement will be required and the amount of the obligation can be measured reliably.

All expenditure is accounted for on an accruals basis. All expenses including support costs and governance costs are allocated or apportioned to the applicable expenditure headings. Where an employee works in more than one department, their costs are allocated on the basis of time worked in each department. Certain overhead costs, such as relevant insurance premiums, are allocated on the basis of staff numbers, while others are allocated on an actual usage basis.

Irrecoverable VAT is charged against the expenditure heading for which it was incurred.

(h) Tangible and heritage fixed assets and depreciation

Heritage assets are assets of scientific importance that are held to advance the preservation, conservation and educational objectives of the charity and through public access contribute to the nation's culture and education at either a national or local level. Freehold nature reserves are included in heritage fixed assets at their acquisition costs and they are not revalued or depreciated. The Charity aims to preserve and enhance its nature reserves, which are not held for their resale potential. The market value of the reserves is of no practical relevance to the Charity's activities. No depreciation is provided because the reserves have an indefinite life.

The costs of leasehold nature reserves are amortised over the period of the lease.

All other tangible fixed assets are held at cost less accumulated depreciation. Depreciation is provided on all other tangible fixed assets as follows:

Freehold property 2% on a straight line basis

Computers on a straight line basis over 3 years

Plant and equipment 15% on written down value

Motor vehicles 25% on written down value

Office equipment, furniture and fittings 15% on written down value

(i) Investments

Listed Investments are stated at fair value which equates to market value at the balance sheet date. The SOFA includes all net gains and losses arising on revaluations and disposals throughout the year. The investment in the subsidiary is stated at cost.

(j) Stock

Stock consists of publications for distribution to members and purchased goods for resale. Stock is valued at the lower of cost or net realisable value, after making due allowance for obsolete and slow moving items.

(k) Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits and other short-term highly liquid investments that are readily convertible to known amounts of cash with insignificant risk of change in value.

(l) Financial instruments

The Trust only has financial assets and financial liabilities of a kind that qualify as basic financial instruments as defined in FRS 102. The financial assets and liabilities of the Trust and their measurement are as follows:

Financial assets – trade debtors, amounts owed by subsidiary company, legacies receivable other debtors are basic financial instruments and are debt instruments measured at amortised cost. Investment portfolios are basic financial instruments measured at fair value through the income and expenditure account. Prepayments are not financial instruments.

Cash at bank and deposit accounts are classified as a basic financial instrument and measured at face value.

Financial liabilities which includes trade creditors, accruals and other creditors are financial instruments and are measured at amortised cost.

(m) Pension costs

The Trust operates a defined contribution pension scheme. Pension contributions in relation to the defined contribution scheme are recognised as an expense in the statement of financial activities as incurred. The Trust contributes 7% of gross annual salary for participating employees.

(n) Operating leases

Rentals paid under operating leases are charged to the SOFA as incurred.

(o) Volunteer support

The Trust receives support from a wide variety of volunteers. It is not practical to place a value on the time volunteered by all these persons, due to the variety of duties performed, the differences in time spent, and the sheer number of volunteers who kindly donated their time.

(p) Critical accounting estimates and judgements

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income and expenses. Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. The resulting accounting estimates will, by definition, seldom equal the related actual results.

Recognising income from legacies often entails estimating the time and final amount distributed by an estate to the Trust. The estimate of the amount and the judgement as to whether or not it should be recognised in the accounts could have a significant impact on the reported assets of the Trust.

The Trustees are of the opinion that, apart from legacies, there are no other estimates or assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year.

(q) Provisions

The Trust recognises a provision where it has a liability which is of uncertain timing or amount. Movements in provisions are recognised in the SOFA in the period in which they occur. Provisions are discounted where the time impact of money is material.

2. MEMBERSHIP, DONATIONS AND LEGACIES

	Unrestricted £'000	Restricted £'000	Total 2025 £'000	Unrestricted £'000	Restricted £'000	Total 2024 £'000
Membership	919	-	919	890	-	890
Donations and appeals	228	474	702	145	730	875
Legacies	502	36	538	310	-	310
	1,649	510	2,159	1,345	730	2,075

3. INCOME FROM CHARITABLE ACTIVITIES

	Unrestricted £'000	Restricted £'000	Total 2025 £'000	Unrestricted £'000	Restricted £'000	Total 2024 £'000
More space for nature - nature recovery						
DEFRA	-	409	409	-	172	172
Natural England	-	370	370	-	327	327
Statutory body grants	-	97	97	-	72	72
Other grants	-	400	400	-	200	200
Consultancy fees	88	-	88	194	-	194
	88	1,276	1,364	194	771	965
More space for nature - nature reserves						
DEFRA	445	22	467	418	26	444
Natural England	-	8	8	-	-	-
Statutory body grants	-	13	13	-	-	-
Other grants	-	8	8	-	121	121
Grazing licences and property lettings	17	-	17	19	-	19
Wood and firewood sales	1	-	1	1	-	1
	463	51	514	438	147	585
A movement for nature - Team Wilder						
DEFRA	-	8	8	-	3	3
Statutory body grants	-	-	-	-	17	17
Other grants	-	275	275	1	272	273
	-	283	283	1	292	293
Telling Somerset's story - Somerset's Environmental Records Centre						
Other grants	-	30	30	-	23	23
Service level agreements	105	-	105	92	-	92
Data services	90	-	90	96	-	96
Sales income	-	-	-	10	-	10
	195	30	225	198	23	221
	746	1,640	2,386	831	1,233	2,064

4. INCOME FROM OTHER TRADING ACTIVITIES

	Charity £'000	SWT (Sales) Ltd (see note 23) £'000	Total 2025 £'000	Charity £'000	SWT (Sales) Ltd (see note 23) £'000	Total 2024 £'000
Shop sales	2	-	2	2	-	2
Fundraising events	9	-	9	7	-	7
Other fundraising activities	43	-	43	72	-	72
SWT (Sales) Ltd	-	623	623	-	553	553
	54	623	677	81	553	634

5 INVESTMENT INCOME

	Unrestricted £'000	Restricted £'000	Total 2025 £'000	Unrestricted £'000	Restricted £'000	Total 2024 £'000
Dividends receivable from equity shares	16	-	16	25	-	25
Interest receivable from bank and deposit accounts	110	-	110	107	-	107
	126	-	126	132	-	132

6. BREAKDOWN OF EXPENDITURE

	Activities undertaken directly £'000	Support costs £'000	Total 2025 £'000	Activities undertaken directly £'000	Support costs £'000	Total 2024 £'000
Expenditure on raising funds						
Cost of raising funds	283	89	372	253	74	327
Membership recruitment and retention	366	59	425	257	39	296
Merchandising costs	2	-	2	2	-	2
Investment management fees	8	-	8	5	-	5
SWT (Sales) Ltd	608	156	764	525	125	650
	1,267	304	1,571	1,042	238	1,280
Charitable activities						
More space for nature - nature recovery	1,557	199	1,756	1,161	136	1,297
More space for nature - nature reserves	918	146	1,064	851	142	993
A movement for nature - Team Wilder	599	212	811	685	203	888
Telling Somerset's story - Somerset Environmental Records Centre	157	38	195	198	45	243
	3,231	595	3,826	2,895	526	3,421
	4,498	899	5,397	3,937	764	4,701

SUPPORT COST BREAKDOWN BY ACTIVITY

	Costs of generatng voluntary income £'000	Membership recruitment and retention £'000	SWT (Sales) Ltd £'000	More space for nature - nature recovery £'000	More space for nature - nature reserves £'000	A movement for nature - Team Wilder £'000	Telling Somerset's story - Somerset Environment Records Centre £'000	Total 2025 £'000	Total 2024 £'000
Finance	15	7	36	47	36	33	9	183	141
HR/Staff support	11	5	25	33	25	23	6	128	86
Office costs	9	4	21	28	21	19	5	107	103
Property and motor vehicles	8	3	17	23	17	16	4	88	81
Recoverable VAT	(7)	-	-	(4)	(23)	(4)	-	(38)	(26)
Marketing	30	30	2	2	16	75	-	155	149
Information technology	13	6	32	41	31	29	8	160	120
National and regional support	5	2	11	14	11	10	3	56	52
Insurance	1	-	2	2	2	2	-	9	10
Governance	4	2	10	13	10	9	3	51	48
	89	59	156	199	146	212	38	899	764

BASIS OF ALLOCATION

Finance	Headcount
HR/staff support	Headcount
Office costs	Headcount
Property and motor vehicles	Headcount
Recoverable VAT	Actual resources expended
Marketing	Actual resources expended
Information technology	Headcount
National support	Headcount
Insurance	Headcount
Governance	Headcount

7. OTHER COST DISCLOSURES

	Total 2025 £'000	Total 2024 £'000
Depreciation	136	139
Auditors' remuneration:		
Audit fees	19	13
Other assurance services	4	-
Loss/(Profit) on disposal of fixed assets	3	(2)

8. STAFF COSTS

	Total 2025 £'000	Total 2024 £'000
Wages and salaries	2,696	2,362
Social security costs	263	219
Pension costs	180	153
	3,139	2,734

The number of employees whose remuneration exceeded £60,000 was as follows:

	Total 2025	Total 2024
£60,000 - £69,999	3	-
£70,000 - £79,999	-	1
£80,000 - £89,999	1	-
	4	1

Total remuneration of key management personnel in the period was £319,000. A different designation of key management personnel applied in the prior year (2024: £504,000).

The key management personnel of the group and the parent charity comprise the Trustees, Chief Executive Officer, Director of Nature Recovery, Director of Action for Nature and Director of Business Planning and Development.

The average number of employees during the year, analysed by function, was:

	2025 Number	2024 Number
Charitable activities	84	78
Raising funds	8	8
Governance	1	1
	93	87

The average number of full-time equivalent employees during the year totalled 79 (2024: 75).

9. TRUSTEE EMOLUMENTS

	Total 2025 £'000	Total 2024 £'000
Donations received from Trustees	1	1

Trustees did not receive any remuneration or benefits in kind during either year. Trustees did not receive any reimbursement for travel expenses during the year (2024: one).

10. PENSION COSTS

Defined contribution scheme

The Trust contributes 7% of annual salary to employees' current pension schemes, all of which are now defined contribution in nature. The pension charge for the year in respect of these contributions amounted to £180,000 (2024: £153,000).

11. TANGIBLE AND HERITAGE FIXED ASSETS

Group

	Nature reserves						
	Freehold (Heritage funds) £'000	Leasehold £'000	Freehold and leasehold property £'000	Plant and equipment £'000	Vehicles £'000	Office equipment £'000	Total £'000
Cost							
At 1 April 2024	4,788	104	1,133	713	200	329	7,267
Additions	809	-	-	87	17	24	937
Disposals	-	(1)	-	(66)	(13)	(97)	(177)
At 31 March 2025	5,597	103	1,133	734	204	256	8,027
Depreciation							
At 1 April 2024	-	104	174	385	149	254	1,066
Charge for the year	-	-	23	55	15	43	136
Disposals	-	(1)	-	(55)	(13)	(96)	(165)
At 31 March 2025	-	103	197	385	151	201	1,037
Net book value							
At 31 March 2025	5,597	-	936	349	53	55	6,990
At 31 March 2024	4,788	-	959	328	51	75	6,201

Charity

	Nature reserves						
	Freehold (Heritage funds) £'000	Leasehold £'000	Freehold and leasehold property £'000	Plant and equipment £'000	Vehicles £'000	Office equipment £'000	Total £'000
Cost							
At 1 April 2024	4,788	104	1,133	671	200	270	7,166
Additions	809	-	-	81	17	21	928
Disposals	-	(1)	-	(57)	(13)	(80)	(151)
At 31 March 2025	5,597	103	1,133	695	204	211	7,943
Depreciation							
At 1 April 2024	-	104	174	359	149	201	987
Charge for the year	-	-	23	52	15	38	128
Disposals	-	(1)	-	(49)	(13)	(79)	(142)
At 31 March 2025	-	103	197	362	151	160	973
Net book value							
At 31 March 2025	5,597	-	936	333	53	51	6,970
At 31 March 2024	4,788	-	959	312	51	69	6,179

Heritage fixed assets

Heritage assets are represented as freehold nature reserves above. A summary of transactions relating to heritage assets over the last five years is as follows:

	2025 £'000	2024 £'000	2023 £'000	2022 £'000	2021 £'000
Cost of acquisitions	748	323	187	1,144	108
Value of donated assets	61	5	-	-	-
Carrying amount of disposals	-	-	-	-	-
Proceeds of disposals*	-	-	-	35	-
Value of impairment	-	-	-	-	-

*Proceeds of disposals in 2022 represents the sale of land that was donated to Trust.

12. INVESTMENTS

Group and Charity

	Listed Securities £'000	Cash holdings £'000	Total 2025 £'000	Total 2024 £'000
Cost				
At 1 April 2024	745	36	781	787
Additions	131	110	241	257
Disposals	(133)	(137)	(270)	(263)
At 31 March 2025	743	9	752	781
Revaluations				
Unrealised gains at 1 April 2024	66	-	66	49
Net (losses)/gains arising on revaluations in the year	(42)	-	(42)	18
Disposals/reverse revaluations	23	-	23	(1)
Unrealised gains at 31 March 2025	47	-	47	66
Fair value at 31 March 2025	790	9	799	847

At 31 March 2025 the charity had one wholly owned subsidiary, SWT (Sales) Limited. The charity owns 100% of the company's ordinary share capital. The principal activity of SWT (Sales) Limited is that of environmental consultancy work (see note 23).

13. STOCKS

	Group		Charity	
	2025 £'000	2024 £'000	2025 £'000	2024 £'000
Stocks	1	1	1	1
	1	1	1	1

14. DEBTORS

	Group		Charity	
	2025 £'000	2024 £'000	2025 £'000	2024 £'000
Trade debtors	367	711	281	581
Other debtors	88	76	88	76
Prepayments and accrued income	660	427	597	398
Legacies receivable	562	361	562	361
Amounts owed by subsidiary company	-	-	176	209
	1,677	1,575	1,704	1,625

Other debtors includes £30,000 (2024: £nil) due after more than one year.

Legacies are only recognised in the accounts when probate has been granted and the amount of the distribution from the estate to the Trust can be estimated with sufficient accuracy. The Trust has been notified of 1 legacy with an approximate value of £300,000 (2024: 0 legacies, approximate value £Nil) which has not been recognised as income due to uncertainty over the value of the gift.

15. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	Group		Charity	
	2025 £'000	2024 £'000	2025 £'000	2024 £'000
Trade creditors	239	263	236	258
Other creditors and accruals	156	214	148	207
	395	477	384	465

16. CREDITORS: AMOUNTS FALLING DUE IN MORE THAN ONE YEAR

	Group		Charity	
	2025 £'000	2024 £'000	2025 £'000	2024 £'000
Other loan	810	-	810	-
	810	-	810	-

A philanthropic loan enabled the purchase of 31.57 hectares at Sharpham in June 2024. The loan is repayable over a 3 year term ending 2027. No interest is payable in respect of the loan.

17. PROVISIONS FOR LIABILITIES

	Group		Charity	
	2025 £'000	2024 £'000	2025 £'000	2024 £'000
Provisions				
Balance at 1 April 2024	-	-	-	-
Provisions recognised in the year	376	-	376	-
Provisions utilised in the year	-	-	-	-
Balance at 31 March 2025	376	-	376	-

The Trust participated in the Wildlife Trusts Pension Scheme, a hybrid, multi-employer pension scheme which provides benefits to members on a defined benefit or a defined contribution basis.

During the year ended 31 March 2022, the Trustees were made aware of a potential issue relating to the date of closure of the defined benefit section of this Scheme. Whilst there was uncertainty as to whether this could result in an additional liability, the Trustees designated a financial reserve of £500,000 in 2023/24 as a precautionary measure to cover this matter.

After extensive investigation by RSWT and their legal advisors it has been established that there is an additional financial liability to employers who participated in the defined benefit section of the Scheme. In addition, the breach of the Section 75 clause and subsequent exit from the Scheme by Somerset Wildlife Trust, has proven invalid. Accordingly the Trust is responsible for a share of the total financial liability.

In order to address the additional Scheme liability the pension trustee, working with RSWT and the Scheme's actuaries, has developed a Recovery Plan that aims to eliminate the total deficit over a six-year period.

Information regarding the financial position (as at 1 April 2024 the date of the latest actuarial valuation) of the Wildlife Trusts Pension Scheme (as a whole) is as follows:

The total Scheme deficit was £4.52m on a Statutory Funding Objective Basis. The assumptions that have the most significant effect on the results of the valuation are:

- Discount rate pre-retirement 6.51%
- Discount rate post-retirement 4.26%
- Revaluation in deferment (CPI) 2.95%
- Pension increases: fixed 5% pa and RPI max 3.45%
- Retirement mortality assumptions are based on S2PA tables projected by each member's year of birth.

Somerset Wildlife Trust's contribution to the Recovery Plan is £71,000 per annum.

As permitted under FRS 102 the Trust accounts for the defined benefit scheme as if it were a defined contribution scheme and recognises a liability for the present value of the contributions payable by the Trust under the Recovery Plan. The present value of £376,000 has been calculated using a discount rate of 5.6% representing the single equivalent discount rates derived using the iBoxx AA-rated corporate bond curve as at 31 March 2025.

18. FINANCIAL INSTRUMENTS

Categorisation of financial instruments

	Group		Charity	
	2025 £'000	2024 £'000	2025 £'000	2024 £'000
Financial assets measured at fair value through the income and expenditure account	799	847	799	847
Financial assets that are debt instruments measured at amortised cost	1,017	1,148	1,107	1,227
	1,816	1,995	1,906	2,074

Item of income, expenditure, gain or losses

	Group				Charity			
	Income £'000	Expense £'000	Net gains £'000	Net losses £'000	Income £'000	Expense £'000	Net gains £'000	Net losses £'000
2025								
Financial assets measured at fair value through the income and expenditure account	16	8	-	(42)	16	8	-	(42)
	16	8	-	(42)	16	8	-	(42)
2024								
Financial assets measured at fair value through the income and expenditure account	25	5	18	-	25	5	18	-
	25	5	18	-	25	5	18	-

19. OPERATING LEASE COMMITMENTS

Minimum lease payments on non-cancellable operating leases fall due as follows:

	Group		Charity	
	2025 £'000	2024 £'000	2025 £'000	2024 £'000
Within one year	5	8	5	8
Due one to five years	4	5	4	5
	9	13	9	13

20. STATEMENT OF FUNDS

	At 1 April 2024 £'000	Income £'000	Expenditure £'000	Transfers £'000	Investment gains £'000	At 31 March 2025 £'000
Unrestricted funds						
Income fund	2,217	3,198	(3,152)	(134)	(42)	2,087
Total unrestricted funds	2,217	3,198	(3,152)	(134)	(42)	2,087
Designated funds						
Nature reserves (heritage funds)	1,715	-	-	809	-	2,524
Operating freehold	959	-	(23)	-	-	936
Nature reserves development	16	-	(3)	-	-	13
Development fund	500	-	-	(500)	-	-
Innovation fund	35	-	-	(15)	-	20
Nature reserves fund	75	-	(75)	-	-	-
Somerset Environmental Records Centre	132	-	-	(36)	-	96
Wildlife Trusts Pension Scheme	500	-	(376)	(124)	-	-
Total designated funds	3,932	-	(477)	134	-	3,589
Restricted funds						
More space for nature - nature recovery	1,310	1,417	(1,718)	-	-	1,009
More space for nature - nature reserves	123	176	(133)	25	-	191
A movement for nature - Team Wilder	81	527	(263)	(25)	-	320
Telling Somerset's story - Somerset Environmental Records Centre	-	30	(30)	-	-	-
Total restricted funds	1,514	2,150	(2,144)	-	-	1,520
Endowment funds						
Nature reserves (heritage funds)	3,073	-	-	-	-	3,073
Total endowment funds	3,073	-	-	-	-	3,073
Total funds	10,736	5,348	(5,773)	-	(42)	10,269

Unrestricted funds

The unrestricted funds represent the free funds of the charity, which are not designated for a particular purpose and are maintained in accordance with the policy explained in the Trustees' report.

Designated funds

The nature reserve fund represents funds other than endowment funds that the charity has used to purchase nature reserves.

The operating freehold fund represents the value of the Trust's freehold property, comprising the main headquarters in Taunton and buildings at Honeygar.

The designated nature reserve development fund represents proceeds from the sale of land during 2016/17 which the charity has set aside specifically for re-investment in nature reserves.

The designated development fund represents funds that the charity has set aside for investment in delivering the Wilder Somerset 2030 strategy.

The innovation fund represents funds that have been set aside to support strategically important initiatives that will enhance the delivery of the Trust's programme of work.

The nature reserves fund represents funds set aside to to mitigate the reduction in agri-environment income.

The Somerset Environmental Records Centre fund represents the cumulative surplus generated through SERC activities which has been earmarked for future investment in SERC activities.

The Wildlife Trusts Pension Scheme fund represents funds that were set aside should a future liability arise which is now recognised as a provision.

Restricted funds

The restricted income funds of the charity include restricted funds comprising the unexpended balances of donations, grants and other income, which are to be applied for specific purposes within the charity's objectives:

► More space for nature

► Nature recovery – improving nature everywhere through a Nature Recovery Network.

► Nature reserves – manage our nature reserves for conservation purposes.

► A movement for nature – taking action for nature's recovery across Somerset as part of Team Wilder.

► Telling Somerset's story – through our online State of Nature platform that informs action and monitors progress.

Nature recovery includes £347,000 (2024: £277,000) from Natural England from the Nature for Climate Peatland Grant Scheme.

21. TRANSFERS BETWEEN FUNDS

	Total 2025 £'000	Total 2024 £'000
Designated funds		
Nature reserves	809	328
Operating freehold reserve	-	(12)
Development reserve	(500)	(1,234)
Innovation fund	(15)	15
Somerset Environmental Records Centre	(36)	66
Wildlife Trusts Pension Scheme	(124)	500
Restricted funds		
More space for nature - nature recovery	-	16
More space for nature - nature reserves	25	(339)
A movement for nature - Team Wilder	(25)	-
Unrestricted funds	(134)	660
	-	-

The designated nature reserves transfer represents land acquired in the year.

The designated operating freehold reserve transfer in 2024 represents the depreciation charged in the year on the Trust's freehold property.

The designated development transfer represents the use of the reserve to offset the planned deficit in 2024/25 as the Trust invested in its development.

The designated innovation fund transfer represents funds that have been set aside by the charity to support strategically important initiatives that will enhance the Trust's programme of work.

The Somerset Environmental Records Centre fund transfer represents the movement in the cumulative funds which have been set aside for future investment in SERC.

The Wildlife Trusts Pension Scheme transfer represents the funds that were set aside and are now recognised as a provision (see note 17).

The restricted fund transfer represents the transfer of funds as agreed with the donor.

22. ANALYSIS OF GROUP NET ASSETS BETWEEN FUNDS

	Unrestricted Funds £'000	Designated Funds £'000	Restricted Funds £'000	Endowment Funds £'000	Total Funds £'000
Tangible and heritage fixed assets	457	3,460	-	3,073	6,990
Investments	799	-	-	-	799
Current assets	2,412	129	1,520	-	4,061
Current liabilities	(1,581)	-	-	-	(1,581)
	2,087	3,589	1,520	3,073	10,269

23. SUBSIDIARY COMPANY

SWT (Sales) Limited income and expenditure statement for the year ended March 2025

	2025 £'000	2024 £'000
Turnover	734	592
Cost of sales	516	485
Gross profit	218	107
Administrative expenses	131	115
Net profit	87	(8)
Taxation	-	-
Net profit after taxation	87	(8)
Paid under gift aid to Trust	87	(8)
Profit brought forward	-	-
Retained profit carried forward	-	-
Turnover includes a charge of £111,000 (2024: £39,000) for services to the Trust. The aggregate of the assets, liabilities and funds of SWT (Sales) Limited was:		
Assets	187	213
Liabilities	(187)	(221)
Funds	-	(8)

24. RECONCILIATION OF NET INCOME/(EXPENDITURE) TO NET CASH INFLOW FROM OPERATING ACTIVITIES

	2025 £'000	2024 £'000
Net (expenditure)/income for the reporting period (as per the statement of financial activities)	(467)	222
Adjustments for:		
Depreciation charges	136	139
Losses/(gains) on investments	42	(18)
Dividends, interest and rents from investments	(126)	(132)
Loss/(profit) on disposal of fixed assets	3	(2)
Increase/(decrease) in provision for liabilities	376	(50)
(Increase) in debtors	(102)	(6)
Increase/(decrease) in creditors	728	(164)
Net cash provided by operating activities	590	(11)

25. ANALYSIS OF CASH AND CASH EQUIVALENTS

	2025 £'000	2024 £'000
Cash at bank and in hand	482	290
Deposit accounts (less than 3 months)	1,901	2,299
Investment cash holdings	9	36
	2,392	2,625



26. STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2024

	Unrestricted Funds		Restricted	Endowment	Funds
	General £'000	Designated £'000	Funds £'000	Funds £'000	2024 £'000
Income from:					
Donations and legacies	1,345	-	730	-	2,075
Charitable activities:					
More space for nature - nature recovery	194	-	771	-	965
More space for nature - nature reserves	438	-	147	-	585
A movement for nature	1	-	292	-	293
Telling Somerset's story	198	-	23	-	221
Other trading activities (including SWT (Sales) Ltd)	634	-	-	-	634
Investments	132	-	-	-	132
Total	2,942	-	1,963	-	4,905
Expenditure on:					
Raising funds:					
Cost of raising funds	313	14	-	-	327
Membership recruitment and retention	296	-	-	-	296
Merchandising costs	2	-	-	-	2
Investment management fees	5	-	-	-	5
SWT (Sales) Ltd	650	-	-	-	650
Charitable activities:					
More space for nature - nature recovery	231	23	1,043	-	1,297
More space for nature - nature reserves	647	75	271	-	993
A movement for nature	407	-	481	-	888
Telling Somerset's story	220	-	23	-	243
Total	2,771	112	1,818	-	4,701
Net gain on investments	18	-	-	-	18
Net income/(expenditure)	189	(112)	145	-	222
Transfers between funds	660	(337)	(323)	-	-
Net movement in funds	849	(449)	(178)	-	222
Reconciliation of funds					
Fund balances brought forward at 1 April 2023	1,368	4,381	1,692	3,073	10,514
Fund balances carried forward at 31 March 2024	2,217	3,932	1,514	3,073	10,736

27. STATEMENT OF FUNDS 2024

	At 1 April 2023 £'000	Income £'000	Expenditure £'000	Transfers £'000	Investment Gains £'000	At 31 March 2024 £'000
Unrestricted funds						
Income fund	1,368	2,942	(2,771)	660	18	2,217
Total unrestricted funds	1,368	2,942	(2,771)	660	18	2,217
Designated funds						
Nature reserves (heritage funds)	1,387	-	-	328	-	1,715
Operating freehold	994	-	(23)	(12)	-	959
Nature reserves development	16	-	-	-	-	16
Development fund	1,734	-	-	(1,234)	-	500
Innovation fund	34	-	(14)	15	-	35
Nature reserves fund	150	-	(75)	-	-	75
Somerset Environmental Records Centre	66	-	-	66	-	132
Wildlife Trusts Pension Scheme	-	-	-	500	-	500
Total designated funds	4,381	-	(112)	(337)	-	3,932
Restricted funds						
More space for nature - nature recovery	1,271	1,066	(1,043)	16	-	1,310
More space for nature - nature reserves	182	551	(271)	(339)	-	123
A movement for nature- Team Wilder	239	323	(481)	-	-	81
Telling Somerset's story - Somerset Environmental Records Centre	-	23	(23)	-	-	-
Total restricted funds	1,692	1,963	(1,818)	(323)	-	1,514
Endowment funds						
Nature reserves (heritage funds)	3,073	-	-	-	-	3,073
Total endowment funds	3,073	-	-	-	-	3,073
Total funds	10,514	4,905	(4,701)	-	18	10,736

28. ANALYSIS OF GROUP NET ASSETS BETWEEN FUNDS 2024

	Unrestricted Funds £'000	Designated Funds £'000	Restricted Funds £'000	Endowment Funds £'000	Total Funds £'000
Tangible and heritage fixed assets	454	2,674	-	3,073	6,201
Investments	847	-	-	-	847
Current assets	1,393	1,258	1,514	-	4,165
Current liabilities	(477)	-	-	-	(477)
	2,217	3,932	1,514	3,073	10,736

GIFTS AND DONATIONS

We would like to thank all our members, donors and grant givers for their generous support which is helping nature to recover across Somerset including all those who wish to remain anonymous.

Legacies

James Francis Archibald
Jennifer Beryl Brewster
Patricia Hilary Buck
Alfred David Charles
Niall Christie
Eileen Anne Cockerham
Mary Carwardine Cooper
Eileen Hemmings
Carole Jane Howie
Diana Mary Killen
Anne Elizabeth Lloyd-Jones
Catherine Valori Menneer
Rosemary Margaret Morgan
Barbara Price
Dr George Malcolm Annesley
Satchwell
Terry John Sheehan
Audrey Mary Syme
Meryl Kay Taylor
Jennifer Ruth Tennant
Lady Patricia Margaret Williamson
Michael Guy Wilson
Derek Norman Landers Yeomans

Patrons

Phillipa Archer
David and Loredana Buchan
Dudley Cheesman
Pete and Trish Comley
John Deverell CBE
Charles Fattorini
James and Alka Hughes- Hallett
Stanley and Jennifer Johnson
Anne Lloyd-Jones
Jean Mantle
Rohan and Lily Masson-Taylor
Mark O'Neill
John Poingdestre
Gill Rickards and Simon Hart
Laura Roberts

Janet Robinson and Paul Groom
Tim and Dede Sanderson
Paul Sheppard and Lucy Dunford
Paul and Mona Sinclair
Patricia Stainton
Lucy Starling
Clive Taylor
Jane Taylor
Patrick Thomson
Chris and Maria Thring
Robert Unwin
Sarah Warren
Neil and Sarah

Corporate members and partners

A C Mole
Bradfords Building Supplies Ltd
Classic Cottages
Frobishers Juices Ltd
Glastonbury Festivals Ltd
Habitat Aid Ltd
Melhuish and Saunders Ltd
Priory Close Veterinary Practice
Somerset Council (LNP & SERC)
Somerset Rivers Authority
Stay Original Co
Wessex Water (LNP)

Grants and Trusts

The City Charity Trust
Hamamelis
Groundworks Trust & Tesco Stores
– Langport, Ilminster, Shepton
Mallett
Battens
Michael Marks
The Rural Prosperity Fund
The Ninesquare Trust
Natural England – Conservation
and Enhancement Scheme

The Foxglove Trust
Joseph Strong Frazer
Thatchers Foundation
Sir John & Lady Amory's CT
Fairfield Charitable Trust
AJH Ashby Will Trust
Neighbourly (Southern Coop)
Norman Family Charitable Trust
Alkpit
Ludlow Trust
Stephen Clark 1965 CS
The Harris Foundation
The Dorothy Whitney Elmhirst
Trust
The Tree Council
The AJ&BA Day Charitable Trust
Linmardon
Royal Society of Wildlife Trust
Blair Foundation
The Wildflower Society
FiPL - Blackdown Hills and Mendip
Hills National Landscape
Charities Aid Foundation

*We would like to acknowledge
all donations made in memory
of Heather Corrie.*



KEY PEOPLE AND ADVISERS

Key people

Patron

Simon King OBE

President

Position currently vacant

Vice-Presidents

Dudley Cheesman

Roger Martin

Chris Sperring MBE

Directors and Trustees

The directors of the charitable company ("the Trust") are its Trustees for the purpose of charity law. The Trustees on the date of approval of this report, all of whom were members for the whole of the financial year in question unless stated otherwise, were as follows:

Chair

Rupert Taylor

Vice-Chair

Tina Trickett

Treasurer

Stephen Rogers

Elected Trustees

Matthew Bell

Amy Coulthard

Edward Green

(resigned 9 November 2024)

Philip Holms

(resigned 9 November 2024)

Stuart McBride

Holly Purdey

Stephen Rogers

Dr Richard Scarlett

Dr Daniel Skinner

Dr Mark Steer

Rupert Taylor

Tina Trickett

Somerset Wildlife Trust is a registered charity.

Charity number 238372.

Company number 818162.

Registered office: 34

Wellington Road, Taunton,

Somerset TA1 5AW

SWT (Sales) Ltd Directors

Georgia Dent

Malcolm Hutton

Stuart McBride

Damien Reid

Peter Solly

Tina Trickett

(appointed 4 June 2024)

Chair of SWT (Sales) Ltd

Patrick Vandestein

Executive Team

Georgia Dent,

Chief Executive Officer

James Grischeff,

Director of Nature

Recovery

Adam Murray,

Director of Action

for Nature

Paul Smith,

Director of Business

Planning & Development

Advisers

Senior Statutory Auditor

Michelle Ferris, Albert

Goodman, Goodwood

House, Blackbrook

Park Avenue, Taunton,

Somerset, TA1 2PX

Bankers

Lloyds Bank, 31 Fore

Street, Taunton, Somerset

TA1 1HN

CCLA Investment

Management Limited,

One Angel Lane,

London, EC4R 3AB

Solicitors

Clarke Willmott,

Blackbrook Gate,

Blackbrook Park Avenue,

Taunton, Somerset

TA1 2PG

Investment Managers

Rathbones Investment

Management Limited,

10 Queen Square, Bristol,

BS1 4NT

Land Agents

Greenslade Taylor Hunt,

1 High Street, Chard,

Somerset





PICTURE CREDITS:

Cover, Terry Whittaker/2020 VISION

P2, Jamie Hall

P3, Jon Hawkins/Surrey Hills Photography

P4, Chris Gomersall/2020VISION

P6, Guy Edwardes/2020VISION

P7, Jon Hawkins/Surrey Hills Photography

P8 (kingfisher), Malcolm Brown

P8 (shrill carder bee), Gabrielle Horup

P9 (Somerset Levels), Nick Upton/2020VISION

P9 (harvest mouse), Amy Lewis

P10, James Adler

P12 (common blue butterfly), Jon Hawkins/Surrey Hills Photography

P12 (buzzard), Jon Hawkins/Surrey Hills Photography

P16 (common blue butterfly), Tom Hibbert

P16 (family), Ross Hoddinott/2020VISION

P17 (crab), Cathy Lewis

P18, Andrew Parkinson/2020VISION

P20, Jamie Hall

P22, Guy Edwardes/2020VISION

P24 (orchids) Terry Whittaker/2020VISION

P24 (cow), Matthew Roberts

P25 (bechstein's bat), Chris Damant

P26 (beaver), Nick Upton

P26 (apples), Ross Hoddinott/2020VISION

P29, Guy Edwardes/2020VISION

P30, Jon Hawkins/Surrey Hills Photography

P32 (crab), Nick Upton

P32 (pine marten), Terry Whittaker/2020 VISION

P33 (relaxation), Matthew Roberts

P34 (trainee), Fergus Coyle

P37, Jamie Hall

P38, Mark Hamblin/2020VISION

P40 (sphagnum moss), Ben Porter

P41 (snipe), Fergus Gill

P42 (common blue butterfly), Jon Hawkins/Surrey Hills Photography

P42 (fox) Richard Steel/2020 Vision

P43 (great white egret), Derek Moore

P45 (Somerset Levels), Guy Edwardes/2020VISION

P45 (dipper), Andy Rouse / 2020VISION

P46, Chris Gomersall/2020VISION

P52 (large blue butterfly), Keith Warrington

P53, Jon Hawkins/Surrey Hills Photography

P54 (common frog), Margaret Holland

P54 (four spotted chaser), Jon Hawkins/Surrey Hills Photography

P56 (large blue butterfly), Ross Hoddinott

P59, Guy Edwardes/2020VISION

P60 (six spot burnet moth), Shirley Freeman

P60 (grey heron), Terry Whittaker/2020 VISION

P62, Jon Hawkins/Surrey Hills Photography

P63 (volunteers), Mark Hamblin / 2020VISION

P63 (roe deer), Jon Hawkins/Surrey Hills Photography

P64 (water vole), Terry Whittaker/2020VISION

P64 (Glastonbury Tor), Guy Edwardes/2020VISION

P65 (great spotted woodpecker), Jon Hawkins/Surrey Hills Photography

P65 (adder), Jamie Hall

P67, Guy Edwardes/2020VISION

P68, Kieron Huston

P69, John Bridges

P70, Bob Coyle

P71, Andy Rouse / 2020VISION

P72, Andy Rouse / 2020VISION

P73, Andy Rouse / 2020VISION

P74, Andy Rouse / 2020VISION

P76 (badger), Jon Hawkins/Surrey Hills Photography

P76 (sphagnum moss), Ross Hoddinott/2020VISION

P77, Russell Savory

P78, Jon Hawkins/Surrey Hills Photography

P79, Vaughn Matthews

P80, Mark Hamblin/2020VISION

P85, Andrew Parkinson/2020VISION

P99, Jon Hawkins/Surrey Hills Photography

P102, Janet Packham

P103, Terry Whittaker/2020VISION

P104, Jon Hawkins/Surrey Hills Photography