

Trustees' Annual Report for the period

		Period start date			Period end date		
From	1st	August	2019	To	31st	March	2020

Section A Reference and administration details

Charity name

South Kerrier Heritage Trust CIO

Other names charity is known by

The Museum of Cornish Life, Helston

Registered charity number (if any)

1151834

Charity's principal address

Museum of Cornish Life, Helston

Market Place, Helston,

Cornwall

Postcode

TR13 8TH

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Judith Anne Haycock	Trustee & Chairman		South Kerrier Heritage Trust
2	Loveday Elizabeth Trevenen Jenkin	Trustee		South Kerrier Heritage Trust
3	Felicity Nicola Eileen Boase	Trustee & Treasurer		South Kerrier Heritage Trust
4	Reginald John Lovett Boase	Trustee		South Kerrier Heritage Trust
5	David John Turnbull	Trustee & Secretary		South Kerrier Heritage Trust
6	Victoria Wiltshire	Trustee		South Kerrier Heritage Trust
7	Susan Elizabeth Freeman	Trustee		South Kerrier Heritage Trust
8	Simon Richard Colgan	Trustee		South Kerrier Heritage Trust
9	Phillip Woods	Trustee	From 24 th September 2019	South Kerrier Heritage Trust
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
None	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Accountant	Shoreline Accountancy Services	49 Trembel Road, Mullion, Cornwall TR12 7YD

Name of chief executive or names of senior staff members (Optional information)

Museum Director – Annette MacTavish

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Appointment by resolution at a meeting of the Charity Trustees in accordance with the Charity's Constitution

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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

To manage, maintain and develop The Museum of Cornish Life, Helston for the benefit of the public and to advance education in the heritage, arts and crafts of the South Kerrier area.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

South Kerrier Heritage Trust (SKHT) is a community group formed by local volunteers who all have a special interest and connection with The Museum of Cornish Life, Helston. SKHT is a Charitable Incorporated Organisation established specifically to manage the Museum.

The Charity's purpose is as follows and all activities undertaken support this purpose:-

"The Museum of Cornish Life, Helston preserves, protects and promotes the history and culture of Helston and The Lizard Peninsula. The extensive collections are a powerful education and learning resource for all the community, regardless of age, ability or background.

The Museum aims to inspire people to take a fresh look at their surroundings and to foster an interest in and understanding of local heritage, to contribute to the regeneration of the local area by attracting visitors to the town, and to be fully accountable to the people of Helston and the Lizard Peninsula."

The Museum is operated wholly for public benefit and the Objects of SKHT are worded to ensure that this remains sole focus of SKHT.

The Museum of Cornish Life, Helston was established as Helston Museum in 1949 and holds extensive and significant social and local history collections. It is housed in the former Helston Market House and Drill Hall, which is a Grade 2 listed building. It is a Registered Museum and has achieved Full Accreditation under the Museum, Library and Archive Council's Accreditation Scheme.

Following the transition from operation under Cornwall Council to management by SKHT in 2013, the Museum has enjoyed an increasing number of visitors and is now open 6 days per week. The Museum is well-supported by the local communities of Helston and the Lizard as well as attracting significant numbers of holiday-makers to Helston.

SKHT Trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

This report covers the period from 1st April 2019 to 31st March 2020 and is the seventh such report since the establishment of South Kerrier Heritage Trust (SKHT) as a Charitable Incorporated Organisation in April 2013.

Following the renegotiation of the Management Agreement with Cornwall Council in June 2017, SKHT now have tenure of the Museum of Cornish Life, Helston until April 2027 as well as an ongoing annual revenue grant from Cornwall Council to support operations.

During the reporting period the Museum of Cornish Life has seen continued development under the management of the Museum Director, Annette MacTavish:-

Funding from the Arts Council (in partnership with Cornwall Museums Partnership and other Cornwall museums) for National Portfolio Organisation (NPO) has continued in this second year of the four-year funding, to have had a significant and positive impact upon the outputs of the museum. It has allowed for the continued funding of the Community Engagement Curator plus an Internship and Apprenticeship Programme. This has allowed the Museum to expand its curatorial work, community engagement and customer service.

We continue to invest in digital marketing with active Twitter, Instagram and Facebook accounts. During the period, we received funding from The Space to produce eight films that promoted the work of the museum. These films received over 200,000 views. We have now embedded the offer of virtual guided tours of the Museum to residential homes. This weekly activity allows us to reach those people who find physical visits difficult.

Over the period we have continued to expand on our partnership work delivering a Research and Development project funded by Cornwall Museums Partnership with Wildworks to test using digital theatre techniques in museums. The Second World War and Holocaust Partnership project with the Imperial War Museum has also begun with the focus of output being delivered in 2021, including the funding of a digital intern. These new partners are drawing in different audiences to the Museum and expanding our digital work.

Community activity is the heart of our exhibitions and programming. We hosted a range of exhibitions including 'Fictitious Cornwall' an exhibition curated by one of our young volunteers. We loaned in a range of photographs from Penlee House Gallery & Museum as part of a volunteer led programme 'Helston Makes It'. Plus, a range of other community events and interventions including the screening of 'Making the Invisible Visible' - a film made in partnership with artists Melanie Young and Caroline Schanche with Park View and Holifield Farm Project. This was funded by the Community Fund.

Our annual visitor numbers have continued to rise with 23,095 visitors compared with 21,797 the previous year. In terms of finances, SKHT has achieved a positive financial position for the period, reporting an operating surplus of £1,428.71 on a turnover of £160,961.31.

At £160,961.31, this period's level of turnover represents a decrease of approximately 5% vs prior year.

Section E

Financial review

Brief statement of the charity's policy on reserves

SKHT Reserves Policy aims for an operating reserve of 3 months of revenue expenditure and the Trust has been able to achieve this target with an operating reserve of £39,883.15.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Section F


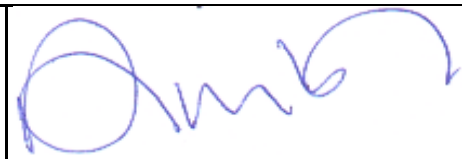
Other optional information

Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Judith Haycock	David Turnbull
Position (eg Secretary, Chair, etc)	Chair	Secretary
Date	22nd September 2020	



SOUTH KERRIER HERITAGE TRUST

UNAUDITED FINANCIAL STATEMENTS

FOR THE PERIOD 1ST APRIL 2019 TO 31ST MARCH 2020

Registered Charity Number 1151834



Shoreline Accountancy Services

49 Trembel Road, Mullion,
Cornwall, TR12 7DY.
Tel: 0744 3500524

email:

shorelineaccountancyservices@outlook.com



Michelle Bowley is licensed and regulated by AAT to provide services
in accordance with licence number 1000830.

SOUTH KERRIER HERITAGE TRUST - YEAR ENDED 31ST MARCH 2020

GENERAL INFORMATION

South Kerrier Heritage Trust (SKHT) is a Charitable Incorporated Organisation.

Registered Charity Number 1151834.

Registered Address:

The Museum of Cornish Life, Helston,
Market Place,
Helston,
Cornwall TR13 8TH
TR13 8TH

Working Address:

The Museum of Cornish Life, Helston,
Market Place,
Helston,
Cornwall TR13 8TH
TR13 8TH

Trustees:

Judith Haycock (Chairman)
Nicola Boase (Treasurer)
John Boase
Loveday Jenkin
David Turnbull (Secretary)
Simon Colgan
Victoria Wiltshire
Sue Freeman
Phillip Woods

Professional Advisers:

Bankers

Lloyds Bank
15 Blackheath Village
Blackheath, London
SE3 9LH

Independent Examiner

Marie Ridge MAAT
Assured Accountancy Services

South Kerrier Heritage Trust - Helston Museum
Financial Activities
April 2019 - March 2020

	Total
Income	
Grant Income	83,326.75
Museum Income	32,422.70
Other Income	45,211.86
Total Income	£ 160,961.31
Expenditures	
Employee Costs	83,966.81
Overheads	75,565.79
Total Expenditures	£ 159,532.60
Net Other Income	£ 0.00
Net Income/(Expenditure)	£ 1,428.71

South Kerrier Heritage Trust - Helston Museum
Balance Sheet
As of August 31, 2020

	Total
Fixed Asset	
Non-Current Assets	31,533.16
Total Fixed Asset	£ 31,533.16
Cash at bank and in hand	104,555.49
Current Assets	6,520.97
Net current assets	£ 111,076.46
Creditors: amounts falling due within one year	
Trade Creditors	203.20
Current Liabilities	71,695.42
Total Creditors: amounts falling due within one year	£ 71,898.62
Net current assets (liabilities)	£ 39,177.84
Total assets less current liabilities	£ 70,711.00
Creditors: amounts falling due after more than one year	4,584.17
Total net assets (liabilities)	£ 66,126.83
Charity funds	66,126.83

SOUTH KERRIER HERITAGE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE PERIOD 1ST APRIL 2019 TO 31 MARCH 2020

- 1 The Financial Statements have been prepared on an accruals basis.
- 2 South Kerrier Heritage Trust is a Charitable Incorporated Organisation which registered with the Charity Commission on 29th April 2013. Its charitable objects are to manage maintain and develop The Museum of Cornish Life, Helston for the benefit of the public and to advance education in the heritage arts and crafts of the South Kerrier area. The Trust assumed responsibility for the running of the museum from 1st August 2013 when it entered into a lease and management agreement with Cornwall Council and took possession of the Museum premises, its collection and inventory. Under the terms of the agreement, Cornwall Council has agreed to pay an annual management fee to the Trust of £45,000.00
- 3 The General Fund represents the funds of the Trust that are not subject to any special restrictions regarding their use and are available for application for general purposes of the trust. The Restricted Fund can only be used for the purpose of capital items in respect of which the grants and donations have been made.
- 4 As at 31st March 2020, the sum of £10,830.89 was ring fenced within the Cornwall Council Museum Donations Fund for the future development of Helston Museum. The trustees can apply for grants from this fund to meet the costs of specific projects in the future.
- 5 The Trust's Reserves Policy aims to set aside 3 months' running costs (expenditure) to ensure the financial security and continued running of the Museum. 3 months' running costs based on the enclosed Financial Statements is calculated as £39,883.15.
At the date of these Financial Statements the Trust has achieved this level of reserves.
- 6 As of 31st March 2020 the balances of all grants and restricted funds is listed below:

Accrued expenses	750.00
Cornish Life Stories	8,775.00
Digital Commission CMP	3,361.09
NPO Grant	-2,124.82
Preservation Equipment	272.54
Cornwall Council Management Grant	0.00
Signage Grant	3,874.78
SKHT Maintenance Responsibilities	8,406.11
Space Fund	-5,988.38
Tanner Trust Grant	3,946.80
Cornwall Council Assets	4,584.17
	25,857.29

7 Grants and Restricted Funds

Reserves	39,883.15
Grants and Restricted Funds	25,857.29
	65,740.44

Total Charity Funds as per balance sheet

66,144.23

Net Free Cash

403.79



CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
South Kerrier Heritage Trust

On accounts for the year
ended

31/3/20

Charity no
(if any)

1151834

Set out on pages

1-2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2020

Responsibilities and
basis of report

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

* Please delete the words in the brackets if they do not apply.

Signed:

Date:

9/9/20

Name:

M RIDGE - RAPS LTD

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

MAAT 10265646

Address:

2nd Floor
1 Meneage St
Helston, TR13 8AA

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

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