

## TRUSTEES' ANNUAL REPORT FOR THE PERIOD ENDED 30TH SEPTEMBER 2025

The Trustees present their annual report together with the financial statements for the period.

### Introductory details

Name:

Cumbria County History Trust (CCHT)

Registered Charity Number:

1137379

Contact Address:

Richard Platt, 9 The Abbey, Carlisle, CA3 8TZ

Chairman:

We record with deep regret the death of the chairman, Sir Roland Jackson, in January 2026. Angus Winchester is serving as interim chairman until the AGM on 24 March 2026.

Secretary:

Lorna Mullett

Treasurer:

Richard Platt

Bankers:

The Cumberland Building Society

Virgin Money

Independent Examiner:

Joanne Batey, MAAT

Trustees who acted during the year

Nominated Trustees

Robert Baxter

William Shannon

Ruth Lawley

Keith Stringer

Penelope Bradshaw

Eleanor Kingston

## Elected Trustees

Marion McClintock

Angus Winchester

Robert David

Roger Bingham (resigned 29/01/2025)

Nicholas Coulson

Mark Blackett-Ord

## Patrons

Sir Christian Bonington CBE

Sir James Cropper, KCVO

Lord Inglewood

## Trustees

The Constitution charges the Trustees with the administration of the Trust and its property. There is no stipulated length of term of office for Officers or Trustees. Full guidance on the duties and responsibilities of Trustees is included in an Information Pack issued to all Trustees. The Charity Commission holds a list of all current Officers and Trustees.

## Summary of the main aims and objectives of the Trust

“To further the education of the public in the history and heritage of the County of Cumbria and its communities, and to promote and foster public knowledge, understanding and appreciation of the history of the area in general.

To undertake research into the history and heritage of the County of Cumbria and its communities and to disseminate the useful results of such research for the public benefit.”

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

Summary of the main activities in relation to those purposes for the public benefit

In conjunction with our academic partner, Lancaster University, we engage in:

- The research, writing and publication of the volumes of the Victoria County History of England (VCH) for the County of Cumbria – the ‘Red Books’.
- The training and supervision of volunteer researchers.
- Setting up, maintaining and updating the Trust’s website, [www.cumbriacountyhistory.org.uk](http://www.cumbriacountyhistory.org.uk).
- Establishing and maintaining a social media presence.

## Summary of the main achievements of the Trust to date

- Publication of VCH Westmorland Volume I (Lonsdale Ward) in September 2025 – the first 'Red Book' for the historic county of Westmorland.
- Publication of the single-volume parish history of Renwick and Kirkoswald.
- Encouragement and support of a wide range of volunteer researchers and writers of parish histories.
- Training programmes for volunteer researchers in conjunction with the Morecambe Bay Partnership.
- Delivery of the Barrow-in-Furness 'Enrich the List' project for Historic England.
- Continuing development of the extensive website, which incorporates summary information on all 348 parishes in Cumbria.

## Progress in 2025

In the period under review the project reached a major milestone with the publication of the first Red Book funded by the Trust. VCH Westmorland Volume I, covering Lonsdale Ward, is the first VCH publication for the historic county of Westmorland and the 250th volume in the national VCH series. The book was published on 8 August 2025 and celebrated at a book launch in Kirkby Lonsdale on 23 September. A very positive review by Alan Crosby appeared in *The Local Historian*, 56(1), pp. 72–3 (February 2026).

Research has begun on two further Red Books, for parts of north-east Cumberland and the Furness and Cartmel areas. The County Editor has embarked on research into Eskdale

Ward, which will be the main focus of her work over the coming three years. Once complete, this will be the first topographical Red Book for the historic county of Cumberland.

Progress on the Furness and Cartmel area, in the historic county of Lancashire, has been slower than anticipated, as fewer volunteers have come forward. Lancaster University's QR-Participatory Research Scheme enabled the project to employ a research assistant between April and June 2025 to liaise with groups, societies and organisations in the area. An additional grant from the Cumberland & Westmorland Antiquarian & Archaeological Society's Fahy Fund has enabled an uplift in the Assistant Editor's contract from 0.5 to 0.6 FTE for 2025 to 2028.

Research in Furness and Cartmel involves expanding the thematic coverage of the existing parish histories in VCH Lancashire Volume VIII (published in 1914) and researching twentieth-century history in order to bring them up to the present day.

In parallel with these two programmes of Red Book research, volunteer work on particular parishes and townships in other parts of Cumbria continues. Their work will add to the 15 draft parish histories already on the website and the histories of Kirkoswald and Renwick, published as a 'VCH Short' (a paperback containing the history of the two parishes) in 2019.

A successful fundraising campaign, under the energetic leadership of our late chairman, Sir Roland Jackson, has enabled the Trust to enter into a contract with Lancaster University to fund the project for the triennium 2025–2028.

Organisational changes at Lancaster University in summer 2025 brought the Regional Heritage Centre under the auspices of the new School of Global Affairs (which includes the discipline of History). The post of Director of the Centre and of the VCH Cumbria project became vacant at the end of the period under review. The Trust maintains close contact

with the University and is hopeful that the hiatus in leadership of the project will be resolved in the near future.

We are grateful to all the funders, volunteers and supporters who make the Trust's work possible, and for the commitment and expertise of the County Editor, Dr Sarah Rose.

### Financial Review

Our financial cycle runs in three-year terms, in step with the fundraising programme and the financial year of Lancaster University, which receives the major portion of our funding. The year ended 30 September 2025 is the final one in the current triennium, showing a surplus of £33,526 (2024: deficit £2,906).

At the end of the period our reserves were £75,150 (2024: £41,625), all held as bank balances accumulated over the life of the Trust and held to further the aims and objectives detailed above.

We are deeply grateful to the Cumberland and Westmorland Antiquarian and Archaeological Society, whose generous grants have helped to bring our project this far, and to our loyal members – on all of whom we continue to rely – as well as various other funders.

### Reserves Policy

We aim to maintain sufficient unrestricted reserves to enable the Trust to manage contingencies as they arise, cope with any cash-flow issues, meet our commitments, and to wind up the Trust in an orderly fashion if the need arises.

### Risk Management Policy

The Trust maintains a Risk Register that is reviewed both by a small risk management group, which reports to every meeting of the Steering Group, and annually by the Trustees. This policy, reviewed regularly, summarises the Trust's awareness, approach and attitude to risk and its proactive management. The Trust also holds a Safeguarding Policy, a Code of Conduct Policy, and policies for Data Protection and Retention.

### Investment Policy

Our investment policy is to hold funds in a range of tiered bank accounts to optimise the interest rates, consistent with the reserves policy.

### Structure, Governance and Management of the Trust

The structure and governance of the Trust is determined by the requirements of its Constitution and by the arrangements put in place to enable it to carry out its aims and objectives, in particular the researching and writing of the Red Books.



Currently there are:

- Three Officers: Chair, Secretary and Treasurer
- A Committee of Trustees
- A Membership Secretary (currently vacant)
- A Website Co-ordinator

Two representatives of our academic partner, Lancaster University, attend meetings to report on the project but are not Trustees. They are the Director of the Regional Heritage Centre (as Director of the Victoria County History of Cumbria) and the Volunteer Co-ordinator/County Editor. The University is a crucial partner in the project with whom the Trust maintains an ongoing operating agreement.

A membership body comprised of:

- Founder members
- Life members
- Standard members
- Associate members
- Postgraduate Associate members
- Friends/Supporters

There is also a body of volunteer researchers and compilers working under the supervision of the Volunteer Co-ordinator for the Red Books project. These volunteers may be members but are not required to be so.

The ongoing business of the Trust is undertaken by the Steering Group, comprised of the Chair, the Secretary, the Treasurer, the Membership Secretary, the Website Co-ordinator, the two members of academic staff, and a representative of the Trustees. This group meets formally three times a year and reports directly to the Board of Trustees. The Steering Group has the authority to set up smaller working groups to deal with specific issues, plans and proposals.

#### Declaration

The Trustees declare that they have approved the Trustees' Report above.

Signed on behalf of the Trustees

Chair: Angus Winchester     Date: 24<sup>th</sup> March 2026

**CUMBRIA COUNTY HISTORY TRUST**  
Financial Statement for the year ended 30th September 2025

**Receipts & Payments Account**

| Receipts                    | Notes | Nine months | Year to  | Payments                   | Notes | Nine      | Year to  |
|-----------------------------|-------|-------------|----------|----------------------------|-------|-----------|----------|
|                             |       | to 30/09/24 | 30/09/25 |                            |       | months to | 30/09/25 |
|                             |       | £           | £        |                            |       | £         | £        |
| Founders' subscriptions     |       | 1600        | 1600     | Lancaster University       | 1.    | 12198     | 22588    |
| Life members                |       | 0           | 0        | Web site                   |       | 1908      | 2232     |
| Members' subscriptions      |       | 580         | 655      | Insurance and memberships  | 2.    | 0         | 672      |
| Societies' subscriptions    |       | 25          | 125      | Meeting expenses           |       | 229       | 278      |
| CWAAS core funding 3rd of 3 |       | 6666        | 6667     | Admin supplies and postage |       | 0         | 595      |
| CWAAS Fahy grant 1st of 6   |       | 0           | 2835     | CLHF                       |       | 0         | 40       |
| Curwen and Kirby grants     |       | 1500        | 1000     | Publishing Red Book 1      | 3.    | 0         | 1803     |
| Donations                   |       | 336         | 48334    |                            |       |           |          |
| Gift aid tax reclaim        |       | 294         | 0        |                            |       |           |          |
| Interest                    |       | 429         | 517      |                            |       |           |          |
| <b>Total Receipts</b>       |       | 11430       | 61733    | <b>Total Payments</b>      |       | 14335     | 28208    |
| <b>Deficit</b>              |       | 2905        | -        | <b>Surplus</b>             |       | -         | 33526    |
|                             |       | 14335       | 61733    |                            |       | 14335     | 61733    |

**Balance Sheet**

|                                    | 30/09/2024 | 30/09/2025 |
|------------------------------------|------------|------------|
| <i>Current Assets</i>              |            |            |
| <b>Cumberland Building Society</b> |            |            |
| Current account                    | 30436      | 62436      |
| One year bond                      | 11188      | 11704      |
| <b>Virgin Money</b>                |            |            |
| Current account                    |            | 1010       |
| <b>Total Assets</b>                | 41624      | 75150      |
| <i>Funds</i>                       |            |            |
| Funds brought forward: 1 Jan 2024  | 44529      | 41624      |
| Less deficit/ Add surplus          | -2905      | 33526      |
| <b>Funds carried forward</b>       | 41624      | 75150      |

**Notes**

1. The last invoice for £4066 for the nine months to September 2024 was paid in the current year, inflating the 2025 figure.
2. Insurance due in December was not payable in the shortened, nine-month period to 30th September.
3. The recently received invoice for £1691.61 from Boydell & Brewer for our share of publishing costs exceeded the 2023 VCH grant of £1000.



**Section A**

**Independent Examiner's Report**

**Report to the trustees/  
members of**

Charity Name  
CUMBRIA COUNTY HISTORY TRUST

**On accounts for the year  
ended**

30<sup>th</sup> SEPTEMBER 2025

**Charity no  
(if any)**

1137379

**Set out on pages**

(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 30/09/2025.

**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:** Joanne Batey

**Date:** 27/01/2026

**Name:** Joanne Batey

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

AAT

**Address:**

21 Irthing Park

Brampton

Cumbria, CA8 1EB

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.**