

SOUTH KERRIER HERITAGE TRUST

England & Wales · Charity number 1151834

Details

Other names SKHT

Status Registered

Legal form CIO

Registered 2013-04-29

Register [View on the Charity Commission register](#)

Contact

Address The Museum Of Cornish Life
Helston
Market Place
Helston
CORNWALL

Phone 01326564027

Email director@museumofcornishlife.co.uk

Website www.museumofcornishlife.co.uk

Activities

Objects: TO MANAGE, MAINTAIN AND DEVELOP HELSTON MUSEUM FOR THE BENEFIT OF THE PUBLIC AND TO ADVANCE EDUCATION IN THE HERITAGE, ARTS AND CRAFTS OF THE SOUTH KERRIER AREA.

Activities: 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.

Classification

- **How:** Provides Buildings/facilities/open Space, Provides Services
- **What:** Arts/culture/heritage/science
- **Who:** Children/young People, Elderly/old People, The General Public/mankind

Geography

- Cornwall

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£269,313	£263,272	-	-
2024-03-31	£269,639	£249,689	-	-
2023-03-31	£234,438	£231,902	-	-
2022-03-31	£228,098	£213,217	-	-
2021-03-31	£270,319	£253,001	-	-

Trustees

Name	Role	Appointed
Jane Reynolds	Chair	2022-09-27
Charlie Johns		2022-09-27
Christine Elizabeth Woods		2025-09-30
James Neil Caddy		2023-10-03
Jenny Rose Lee		2020-10-27
Julia Chambers		2022-09-27
Laura Ellie Warren		2024-09-24
Paige Elizabeth Lawrence		2024-09-24
Sandra Margaret Husk		2023-10-03
Sarah Pringle		2022-09-27
Treve Nicholas Evans		2023-10-03

SOUTH KERRIER HERITAGE TRUST

England & Wales - Charity number 1151834

Accounts

Trustees' Annual Report for the period

Period start date: **From** 1st April 2024 **To** 31st March 2025 **Period end date**

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	Treve Evans	Trustee & Secretary		South Kerrier Heritage Trust
2	Sandra Husk	Trustee & Vice Chair		South Kerrier Heritage Trust
3	Neil Caddy			South Kerrier Heritage Trust
4	Victoria Wiltshire	Trustee	To 25/03/2025	South Kerrier Heritage Trust
5	Susan Elizabeth Freeman	Trustee	To 24.09.2024	South Kerrier Heritage Trust
6	Charlie Johns	Trustee		South Kerrier Heritage Trust
7	Eilish Calnan	Trustee	To 24.09.2025	South Kerrier Heritage Trust
8	Jenny Rose Lee	Trustee & Chair		South Kerrier Heritage Trust
9	Sarah Pringle	Trustee		South Kerrier Heritage Trust
10	Jane Reynolds	Trustee & Vice-Chair		South Kerrier Heritage Trust
11	Julia Chambers	Trustee & Treasurer		South Kerrier Heritage Trust
12	Paige Lawrence	Trustee	From 24.09.2024	South Kerrier Heritage Trust
13	Ellie Warren	Trustee	From 24.09.2024	South Kerrier Heritage Trust
14				
15				
16				
17				
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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.

Section C Objectives and activities

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.

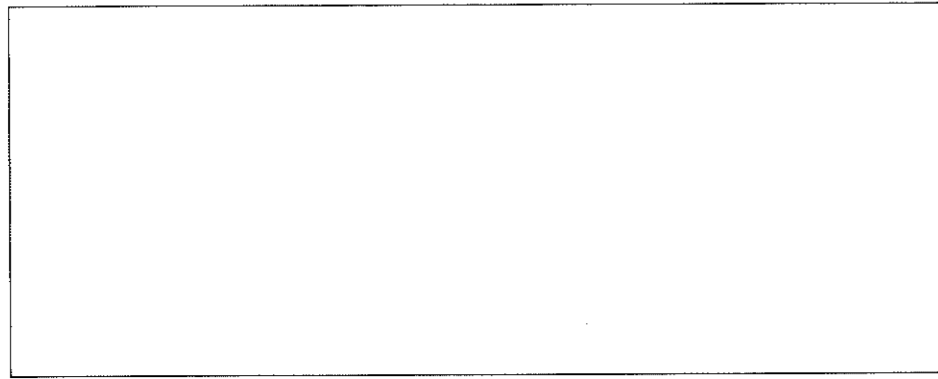
Following the transition from operation under Cornwall Council to management by SKHT in 2013, the Museum has enjoyed an increasing number of visitors and is now open 6 days per week. The Museum is well-supported by the local communities of Helston and the Lizard as well as attracting significant numbers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

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

This report covers the period from 1st April 2024 to 31st March 2025 and is the twelfth 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 continued to develop strongly under the leadership of Museum Director, Annette MacTavish. The Museum has focussed on expanding its links to the community and building skills in caring for the collection.

Funding from Arts Council England was secured for three years starting in 2023 as part of mc⁷, a consortium of museums made up of Bodmin Keep, Falmouth Art Gallery, Museum of Cornish Life, Penlee House, PK Porthcurno, Royal Cornwall Museum and Wheal Martyn. This has provided funding for the Community Engagement Curator, Museum Assistant Engagement (with a Marketing Assistant Apprenticeship at Truro College) and Museum Assistant Collections funded by Arts Council England. This funding has been extended for an additional year.

During the year Isobel King, the Community Engagement Curator focused on deepening our connection with key audiences such as early years, families, schools and older people. She also continues to build new relationship with cultural partners.

We completed our final year of hosting the Finds Liaison Officer for Cornwall. This role was funded by the British Museum with support from Cornwall Council to deliver the work of the Portable Antiquities Scheme. The Finds Liaison Officer, Laura Miucci worked across Cornwall recording archaeological finds discovered by members of the public and processing treasure cases.

Thanks to an award of £78,000 in 2023 from the Museums Association Esmée Fairbairn Collections Fund, the museum continued to reappraisal the farming collections. We have conducting new collections research, undertaken innovative conservation, and considered how to update our collections to better reflect Cornish farming from the 1970s to today. This work is being led by Research Curator Dr. Tehmina Goskar

In addition, we also mounted eight temporary exhibits ranging from an Egypt exhibition as part of Kids in Museums, Reveal (outputs from a collaborative dance project), One and All (a touring exhibition on Cornish Identity by Seamas Carey) and Haunted Cornwall.

Our core team of over 60 volunteers have continued to help us welcome visitors to the museum, research and care for the collection and produce exhibitions. We have supported seventeen young volunteers undertaking placements through schools, university, Duke of Edinburgh and for personal development.

In terms of finances, SKHT has achieved a positive financial position for the period reporting an operating surplus of £6,040 on a turnover of

£269,313. These figures represent a small increase over the previous year's surplus.

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 so the Trustees have agreed to a Reserve level of £57,024.50 in compliance with this policy.

In addition, the Trustees resolved to create a Special Reserve of £15,000 to provide for the continued unpredictability of energy costs.

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.

[Empty box for optional information]

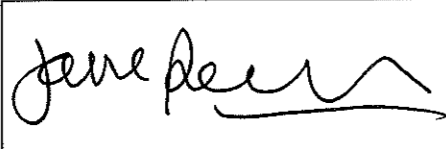

Section F Other optional information

[Empty box for 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)	Jane Reynolds	Treve Evans
Position (eg Secretary, Chair, etc)	Chair	Secretary
Date	19 th December 2025	



SOUTH KERRIER HERITAGE TRUST

UNAUDITED FINANCIAL STATEMENTS

FOR THE PERIOD 1ST APRIL 2024 TO 31ST MARCH 2025

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 2025

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:

Jenny Rose Lee (Chair)
Sandra Margaret Husk
James Neil Caddy
Treve Nicholas Evans
Jayne Reynolds
Julia Chambers
Sarah Pringle
Charlie Johns
Victoria Ruth Wiltshire

Professional Advisers:

Bankers

Lloyds Bank
1 Market Place
Helston
TR13 8SU

Independent Examiner

Claire Martin MAAT
Perfect Sums Accounts Ltd

Statement of Activity Comparison
South Kerrier Heritage Trust - Helston Museum
April 1, 2024-March 31, 2025

Distribution account	Total	
	Apr 1 2024 - Mar 31 2025	Apr 1 2023 - Mar 31 2024 (PY)
Income		
Capital Grant Income	15,285.29	15,052.09
Grant Income	160,393.76	157,290.93
Cornwall Council Management Fee	45,000.00	45,000.00
Art Fund Income		0.00
Revenue Grants		2,500.00
Total for Grant Income	£205,393.76	£204,790.93
Museum Income		
Education Income	3,236.30	2,610.50
Event Income	1,042.25	465.00
Gifts and Donations	16,351.25	16,790.38
Para Hen-Hellys - Membership	896.12	881.31
Sales Income	24,134.97	25,896.62
Total for Museum Income	£45,660.89	£46,643.81
Other Income		
Bank Interest Earned	928.21	859.91
Gift Aid	2,045.18	2,167.10
Total for Other Income	£2,973.39	£3,027.01
Miscellaneous Income		124.89
Unapplied Cash Payment Income		-71.98
Total for Income	£269,313.33	£269,566.75
Cost of Sales		
Good for Resale - Stock	10,248.39	16,544.48
Expenses		
Depreciation Expense	15,695.98	15,197.18
Total for Employee Costs	£131,553.08	£130,138.82
Overheads	564.94	
Accounts & Consultancy	5,840.00	4,990.00
Advertising	2,271.30	6,301.03
Bank Charges	318.91	274.72
Cafe Expenses	306.99	514.57
Consumables	1,217.30	1,134.06
Contract Maintenance	10,920.19	9,966.22
Education Expense	10.00	1,496.15
Electricity & Water rates	20,323.63	18,378.39
Events	341.97	35.65
Insurance Expense	2,471.75	1,780.62
Miscellaneous Expense	15.70	174.65
Office Expense & Postage	314.96	596.62
Professional Fees	558.50	
Project and cost of sales	56,372.95	54,475.54
Repairs & Maintenance	329.10	3,370.74
Subscriptions	712.99	1,331.79
Telephone	2,104.57	2,673.51
Training	86.00	239.98
Travel and Meetings	693.31	1,818.05
Feast Funding		0.00
Total for Overheads	£105,775.06	£109,552.29
Unapplied Cash Bill Payment Expenditure	0.02	
Total for Expenses	£253,024.14	£254,888.29
Net Operating Income	£6,040.80	-£1,866.02
Other Expenses		
Unrealized Gain or Loss		
Total for Other Expenses		
Net Other Income		
Net Income	£6,040.80	-£1,866.02

South Kerrier Heritage Trust - Helston Museum
Balance Sheet
As of March 31, 2025

	Total
	As of Mar 31, 2025
Fixed Asset	
Tangible assets	
Furniture and Fixtures	8,260.91
Total Tangible assets	£ 8,260.91
Total Fixed Asset	£ 8,260.91
Total Cash at bank and in hand	£ 238,537.28
Net current assets	£ 241,215.04
Total Trade Creditors	£ 2,614.28
Total Current Liabilities	£ 132,893.25
Total Creditors: amounts falling due within one year	£ 135,507.53
Net current assets (liabilities)	£ 105,707.51
Total assets less current liabilities	£ 113,968.42
Total net assets (liabilities)	£ 109,384.25
Total Charity funds	£ 109,384.25

SOUTH KERRIER HERITAGE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE PERIOD 1ST APRIL 2024 TO 31 MARCH 2025

- 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 General Funds represent 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. Grants and Restricted Funds can only be used for the procurement of items in respect of which the funding has been made.
- 4 As at 31st March 2025, the sum of £4,584.17 was ring fenced within the Cornwall Council Museum Donations Fund for the future development of The Museum of Cornish Life. 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 is based on the enclosed Financial Statements and is calculated as £63,256.04. Due to the unpredictability of energy costs, and noting that the Museum heating system is wholly based on electricity, the Trustees have decided to create a Special Reserve of £15,000 to protect SKHT CIO from energy price rises. This Special Reserve will be reviewed on a monthly basis and released as necessary over the coming 12 months. Note that the Museum Director is also assessing options for grant funding to improve the energy efficiency of the Museum building.

- 6 As of 31st March 2025 the balances of all grants and restricted funds is listed below:

British Museum Grant	-6,583.70
CMP - Tutorial	-550.00
Esmé Fair Bairn Grant	31,401.00
Legacies	8,162.90
Mend 2	88,604.00
MWJV Grant	164.00
Tanner Phoenix Kynnce Gate	552.76
Tanner Trust Grant	46.80
SKHT Maintenance Responsibilities	8,045.75
	<u>129,843.51</u>

- 7 Summary of restricted funds including reserves

Reserves	57,024.50
Special Reserve	15,000.00
Grants and Restricted Funds	<u>129,843.51</u>
	<u>201,868.01</u>



Section A

Independent Examiner's Report

Report to the trustees

Charity Name SOUTH KERRIER HERITAGE TRUST

On accounts for the year ended

MARCH 2025 Charity no (if any) 1151834

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 31/03/2025

Responsibilities and basis of report

As the charity's trustees, 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 all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

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

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
the accounts did not accord with the accounting records; or
the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

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

Signed: [Signature]

Date: 7/10/25

Name: Ceaire Martin

Relevant professional qualification(s) or body

MAAT 1003572

(if any):

Address:

UNITS WISAC AGAR.
TOLVADON ENERGY PARK
CAMBORNE TR14 0HX

Section B

Disclosure

Only complete if the examiner needs to highlight material 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.

SOUTH KERRIER HERITAGE TRUST

England & Wales - Charity number 1151834

Accounts

Trustees' Annual Report for the period

	Period start date	Period end date
From	1st April 2023	To 31st March 2024

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	Treve Evans	Trustee & Secretary	03/10/2023 to present	South Kerrier Heritage Trust
2	Sandra Husk	Trustee	03/10/2023 to present	South Kerrier Heritage Trust
3	Felicity Nicola Eileen Boase	Trustee & Treasurer	To 03/10/2023	South Kerrier Heritage Trust
4	Neil Caddy		03/10/2023 to present	South Kerrier Heritage Trust
5	David John Turnbull	Trustee & Secretary	To 03/10/2023	South Kerrier Heritage Trust
6	Victoria Wiltshire	Trustee		South Kerrier Heritage Trust
7	Susan Elizabeth Freeman	Trustee		South Kerrier Heritage Trust
8	Charlie Johns	Trustee		South Kerrier Heritage Trust
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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

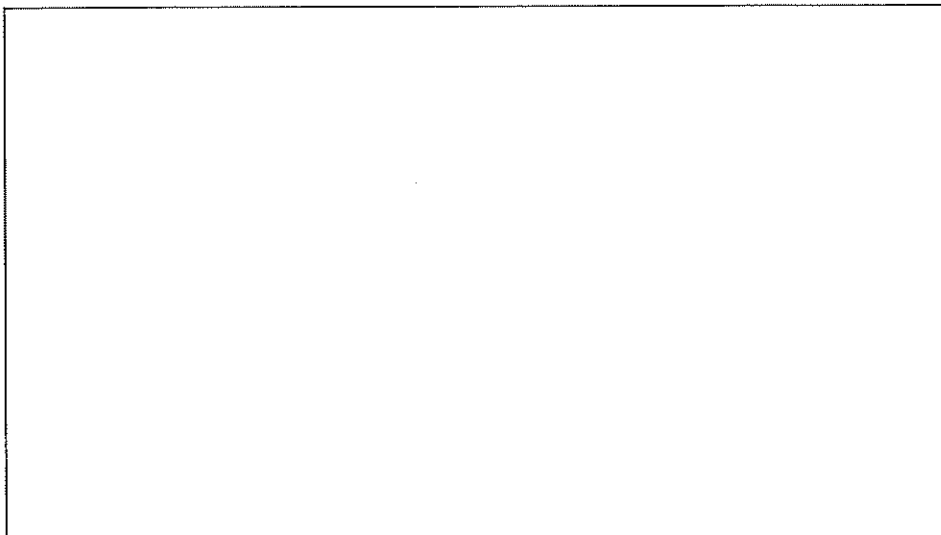
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Additional governance issues (Optional information)

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

- policies and procedures adopted for the induction and training of trustees;
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- trustees' consideration of major risks and the system

and procedures to manage them.



Section C Objectives and activities

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)

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"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.

Summary of the main achievements of the charity during the year

This report covers the period from 1st April 2023 to 31st March 2024 and is the eleventh 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 continued to develop strongly under the leadership of Museum Director, Annette MacTavish. The Museum has continued its recovery from the impact of the pandemic with physical visitor numbers reaching 19,285 in the year.

Funding from Arts Council England was secured for three years as part of mc⁷, a consortium of museums made up of Bodmin Keep, Falmouth Art Gallery, Museum of Cornish Life, Penlee House, PK Porthcurno, Royal Cornwall Museum and Wheal Martyn. This provided funding for the Community Engagement Curator, Museum Assistant Engagement (with a Marketing Assistant Apprenticeship at Truro College) and Museum Assistant Collections (as part of a Work Placement from the University of Exeter) funded by Arts Council England.

During the year Isobel King, the Community Engagement Curator focused on expanding our audiences and in continuing to grow our interactions with early years, families, schools and older people.

We continued to host the Finds Liaison Officer for Cornwall. This role is funded by the British Museum with support from Cornwall Council to deliver the work of the Portable Antiquities Scheme. The Finds Liaison Officer, Laura Miucci, has a remit across Cornwall recording archaeological finds discovered by members of the public and processing treasure cases.

Thanks to an award of £78,000 from the Museums Association Esmée Fairbairn Collections Fund, the museum embarked on a major reappraisal of its farming collections. From April 2023 to April 2025 we will be conducting new collections research, undertaking innovative conservation, and considering how to update our collections to better reflect Cornish farming from the 1970s to today. This work is being led by Research Curator Dr. Tehmina Goskar

In addition, we also mounted eight temporary exhibits including for Talking Threads the significant loan of Grayson Perry's *Comfort Blanket*.

Our core team of over 60 volunteers have continued to help us welcome visitors to the museum, research and care for the collection and produce exhibitions. We have supported twenty-one young volunteers undertaking placements through schools, university, Duke of Edinburgh and for personal development.

In terms of finances, SKHT has achieved a positive financial position for the period reporting an operating surplus of £4,780 on a turnover of £269,638. These figures represent an increase over the previous year's surplus. During the year a revaluation of the Trust's fixed assets was

carried out and the decrease in valuation has been taken to reserves in the amount of £33,832.

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 so the Trustees have agreed to a Reserve level of £57,024.50 in compliance with this policy.

In addition, the Trustees resolved to create a Special Reserve of £15,000 to provide for the continued unpredictability of energy costs.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

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


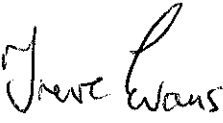
- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

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)	Jenny Lee	Treve Evans
Position (eg Secretary, Chair, etc)	Chair	Secretary
Date	26 th November 2024	

SOUTH KERRIER HERITAGE TRUST
UNAUDITED FINANCIAL STATEMENTS
FOR THE PERIOD 1ST APRIL 2023 TO 31ST MARCH 2024
Registered Charity Number 1151834



Member of the group of companies controlled and operated by AAT Group Holdings Limited, a company registered in England and Wales, number 11016118



Shoreline Accountancy Services

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

email
shorelineaccountancy@btconnect.com

SOUTH KERRIER HERITAGE TRUST - YEAR ENDED 31ST MARCH 2024

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

Working Address:

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

Trustees:

Jenny Rose Lee (Chair)
Sandra Margaret Husk
James Neil Caddy
Treve Nicholas Evans
Jane Reynolds
Julia Chambers
Sarah Pringle
Charlie Johns
Elish Calnan
Susan Elizabeth Freeman
Victoria Ruth Wiltshire

Professional Advisers:

Bankers

Lloyds Bank
1 Market Place
Helston
TR13 8SU

Independent Examiner

Claire Martin MAAT
Perfect Sums Accounts Ltd

South Kerrier Heritage Trust - Helston Museum
Financial Activities
April 2023 - March 2024

	Total	
	Apr 2023 - Mar 2024	Apr 2022 - Mar 2023 (PY)
Income		
Capital Grant Income	15,052.09	2,260.39
Grant Income	157,290.93	151,782.81
Art Fund Income	0.00	191.76
Cornwall Council Management Fee	45,000.00	45,000.00
Grant for Intern		1,000.00
Grant Income NPO		1,409.69
Revenue Grants	2,500.00	1,500.00
Total Grant Income	£ 204,790.93	£ 200,884.26
Miscellaneous Income	124.89	
Museum Income		
Education Income	2,610.50	2,479.30
Event Income	465.00	497.00
Gifts and Donations	16,790.38	11,536.89
Para Hen-Hellys - Membership	881.31	175.00
Sales Income	25,896.62	17,810.63
Total Museum Income	£ 46,643.81	£ 32,498.82
Other Income		
Bank Interest Earned	859.91	152.90
Gift Aid	2,167.10	1,826.92
Total Other Income	£ 3,027.01	£ 1,979.82
Services		450.00
Total Income	£ 269,638.73	£ 238,073.29
Total Cost of Sales	£ 15,169.71	£ 10,020.46
Total	£ 254,469.02	£ 228,052.83
Expenditures		
Depreciation Expense	15,197.18	2,260.39
Dues and Subscriptions		114.00
Total Employee Costs	£ 130,138.82	£ 129,323.50
Overheads		
Accounts & Consultancy	4,990.00	3,438.50
Advertising	6,301.03	5,259.72
Bank Charges	274.72	265.71
Cafe Expenses	514.57	139.92
Consumables	1,106.06	2,806.00
Contract Maintenance	10,094.82	7,484.10
Education Expense`	1,196.15	423.74
Electricity & Water rates	18,378.39	13,617.96
Events	35.65	971.04
Exhibition Expenses		305.52
Insurance Expense	1,780.62	1,753.94
Miscellaneous Expense	174.65	128.17
Office Expense	596.62	1,167.75
Project and cost of sales	49,475.45	46,662.05
Repairs & Maintenance	3,370.74	3,112.30
Subscriptions	1,331.79	648.92
Telephone	2,673.51	2,592.00
Training	239.98	246.00
Travel and Meetings	1,818.05	1,646.98
Total Overheads	£ 104,352.80	£ 92,670.32
Total Expenditures	£ 249,688.80	£ 224,368.21
Net Income/(Expenditure)	£ 4,780.22	£ 3,684.62

South Kerrier Heritage Trust - Heiston Museum
Balance Sheet Summary
As of March 31, 2024

	Total	
	As of Mar 31, 2024	As of Mar 31, 2023 (PY)
Fixed Asset		
Tangible assets	22,790.89	92,999.68
Non-Current Assets	0.00	149.10
Total Fixed Asset	£ 22,790.89	£ 93,148.78
Cash at bank and in hand	146,558.63	104,496.94
Current Assets	6,450.20	5,569.67
Net current assets	£ 153,008.83	£ 110,066.61
Creditors: amounts falling due within one year		
Trade Creditors	9,600.38	0.00
Current Liabilities	58,271.72	65,086.56
Total Creditors: amounts falling due within one year	£ 67,872.10	£ 65,086.56
Net current assets (liabilities)	£ 85,136.73	£ 44,980.05
Total assets less current liabilities	£ 107,927.62	£ 138,128.83
Creditors: amounts falling due after more than one year	4,584.17	4,584.17
Total net assets (liabilities)	£ 103,343.45	£ 133,544.66
Charity funds	103,343.45	133,544.66

SOUTH KERRIER HERITAGE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE PERIOD 1ST APRIL 2021 TO 31 MARCH 2024

- 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 General Funds represent 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. Grants and Restricted Funds can only be used for the procurement of Items in respect of which the funding has been made.
- 4 As at 31st March 2024, the sum of £8,045.75 was ring fenced within the Cornwall Council Museum Donations Fund for the future development of The Museum of Cornish Life. 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 is based on the enclosed Financial Statements and is calculated as £57,024.50. Due to the unpredictability of energy costs, and noting that the Museum heating system is wholly based on electricity, the Trustees have decided to create a Special Reserve of £15,000 to protect SKHT CIO from energy price rises. This Special Reserve will be reviewed on a monthly basis and released as necessary over the coming 12 months. Note that the Museum Director is also assessing options for grant funding to improve the energy efficiency of the Museum building.

There was an adjustment made in the year with regards to the writing down of the capital grants in line with the fixed assets, the adjustments made are stated below:

Reserves as of 31 st March 2023	£132,395.56
Surplus for the period	£4,780.22
Revaluation of assets / capital grant	<u>-£33,832.33</u>
Reserves as of 31 st March 2024	£103,343.45

- 6 As of 31st March 2024 the balances of all grants and restricted funds is listed below:

British Museum Grant	-11,006.62
CMP - Tutorial	6,675.00
Dennis Miner Grant	375.80
Esme Fair Balrn Grant	20,729.00
Legacies	8,162.90
MWJV Grant	584.00
SKHT Maintenance Responsibilities	<u>8,045.75</u>
	33,565.83

- 7 Summary of restricted funds including reserves

Reserves	57,024.50
Special Reserve	15,000.00
Grants and Restricted Funds	<u>33,565.83</u>
	105,590.33

Total Charity Funds as per balance sheet	103,343.45
Net free cash (General Funds)	-2,246.88



Section A Independent Examiner's Report

Report to the trustees

SOUTH KERRIER HERITAGE TRUST.

On accounts for the year ended

31st March 2024

Charity no (if any)

1151834

Set out on pages

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

Responsibilities and basis of report

As the charity's trustees, 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 all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

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

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

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

Signed: [Signature]

Date: 28/6/24

Name: CLAIRE MARTIN

Relevant professional qualification(s) or body

MAAT 1003572

(if any):

Address:

PERFECT SUMS BOOKKEEPING + ACCOUNTS LTD

UNITS WINGAL AGAR.

TOWADDON ENERGY PARK CAMBRIDGE TR14 0HX

Section B

Disclosure

Only complete if the examiner needs to highlight material 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.

SOUTH KERRIER HERITAGE TRUST

England & Wales - Charity number 1151834

Accounts

Trustees' Annual Report for the period

		Period start date			Period end date		
From	1st	April	2022	To	31st	March	2023

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	1 st April 2022 to 27 th September 2022	South Kerrier Heritage Trust
2	Loveday Elizabeth Trevenen Jenkin	Trustee	1 st April 2022 to 27 th September 2022	South Kerrier Heritage Trust
3	Felicity Nicola Eileen Boase	Trustee & Treasurer		South Kerrier Heritage Trust
4	Reginald John Lovett Boase	Trustee	1 st April 2022 to 27 th September 2022	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	Phillip Woods	Trustee	1 st April 2022 to 28 th February 2023	South Kerrier Heritage Trust
9	Eilish Calnan	Trustee		South Kerrier Heritage Trust
10	Jenny Rose Lee	Trustee		South Kerrier Heritage Trust
11	Sarah Pringle	Trustee	27 th September to present	South Kerrier Heritage Trust
12	Jane Reynolds	Trustee	27 th September to present	South Kerrier Heritage Trust
13	Julia Chambers	Trustee	27 th September to present	South Kerrier Heritage Trust
14	Charlie Johns	Trustee	27 th September to present	South Kerrier Heritage Trust
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.



Section C Objectives and activities

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.

Summary of the main achievements of the charity during the year

This report covers the period from 1st April 2022 to 31st March 2023 and is the tenth 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 continued to develop strongly under the leadership of Museum Director, Annette MacTavish. The Museum has continued its recovery from the impact of the pandemic with physical visitor numbers reaching 18,574 in the year.

Funding from the Arts Council England (in partnership with Cornwall Museums Partnership and six other museums in Cornwall) for National Portfolio Organisation (NPO) continued through this year based on an extension to the funding agreement. This provided funding for the Community Engagement Curator, Apprentice and Trainee Curator funded by Arts Council England.

During the year Isobel King, the Community Engagement Curator focused on giving our audiences the confidence to return targeting early years, families, schools and older people.

We continued to host the Finds Liaison Officer for Cornwall. This role is funded by the British Museum with support from Cornwall Council to deliver the work of the Portable Antiquities Scheme. The Finds Liaison Officer, Tasha Fullbrook, has a remit across Cornwall recording archaeological finds discovered by members of the public and processing treasure cases. From October 2022 additional funding was provided by the Headley Trust to support an 8-month Archaeological Finds Intern.

A focus for 2022 was collection management. We gained funding from Art Fund to host a curatorial Headley Fellowship. Dr. Tehmina Goskar undertook research into the history of the museum, history of the old Camborne Museum collection and complex areas of the collection including the toy and doll collection. Through this we have continued to prioritise improvements to our cataloguing and storage.

We concluded the three-year-long 'Second World War and Holocaust Partnership Project' with Bodmin Keep funded by and in partnership with the Imperial War Museums, including a temporary exhibition. In addition to this exhibition, we also mounted six other exhibitions in the temporary exhibition gallery.

Our core team of over 60 volunteers have continued to help us welcome visitors to the museum, research and care for the collection and produce exhibitions. We have supported fifteen young volunteers undertaking placements through schools, university, Duke of Edinburgh and for personal development.

In terms of finances, SKHT has achieved a positive financial position for the period reporting an operating surplus of £2,535.52 on a turnover of £234,437.55. These figures represent a decrease vs the previous year's surplus but a small increase in turnover, which were published as £14,880.85 and £228,097.99 respectively last 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 so the Trustees have agreed to a Reserve level of £57,024.50 in compliance with this policy.

In addition, the Trustees resolved to create a Special Reserve of £15,000 to provide for the continued unpredictability of energy costs.

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)	Jenny Lee	David Turnbull
Position (eg Secretary, Chair, etc)	Chair	Secretary
Date	10 th September 2023	



SOUTH KERRIER HERITAGE TRUST

UNAUDITED FINANCIAL STATEMENTS

FOR THE PERIOD 1ST APRIL 2022 TO 31ST MARCH 2023

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 2023

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:

Jenny Rose Lee (Chair)
Nicola Boase (Treasurer)
Charlie Johns
Jane Reynolds
David Turnbull (Secretary)
Victoria Wiltshire
Sue Freeman
Julia Chambers
Elish Calnan
Jenny Rose Lee
Sarah Pringle

Professional Advisers:

Bankers

Lloyds Bank
1 Market Place
Helston
TR13 8SU

Independent Examiner

Claire Martin MAAT
Perfect Sums Accounts Ltd

South Kerrier Heritage Trust - Helston Museum
Financial Activities
April 2022 - March 2023

		Total
Income		
Capital Grant Income		2,260.39
Total Grant Income	£	199,884.26
Museum Income		
Education Income		2,479.30
Event Income		497.00
Gifts and Donations		11,536.89
Para Hen-Hellys - Membership		175.00
Sales Income		17,810.63
Total Museum Income	£	32,498.82
Other Income		
Bank Interest Earned		152.90
Gift Aid		1,826.92
Total Other Income	£	1,979.82
Services		450.00
Total	£	234,437.55
Expenditures		
Depreciation Expense		2,260.39
Dues and Subscriptions		114.00
Total Employee Costs	£	129,323.50
Overheads		
Accounts & Consultancy		3,438.50
Advertising		5,259.72
Bank Charges		265.71
Business Rates		479.20
Cafe Expenses		139.92
Consumables		2,806.00
Contract Maintenance		7,484.10
Cost of sales		749.13
Education Expense`		572.84
Electricity & Water rates		13,138.76
Events		971.04
Exhibition Expenses		305.52
Good for Resale - Stock		6,635.59
Training		246.00
Travel and Meetings		1,646.98
Total Overheads	£	100,204.14
Total Expenditures	£	231,902.03
Net Operating Income	£	2,535.52

South Kerrier Heritage Trust - Helston Museum
Balance Sheet Summary
As of March 31, 2023

	Total
Fixed Asset	
Tangible assets	92,999.68
Non-Current Assets	0.00
Total Fixed Asset	£ 92,999.68
Cash at bank and in hand	104,496.94
Debtors	0.00
Current Assets	5,569.67
Net current assets	£ 110,066.61
 Creditors: amounts falling due within one year	
Trade Creditors	0.00
Current Liabilities	5,457.13
Total Creditors: amounts falling due within one year	£ 5,457.13
Net current assets (liabilities)	£ 104,609.48
Total assets less current liabilities	£ 197,609.16
 Creditors: amounts falling due after more than one year	
Accruals and deferred income	4,584.17
Total net assets (liabilities)	£ 132,395.56
Charity funds	132,395.56

SOUTH KERRIER HERITAGE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE PERIOD 1ST APRIL 2021 TO 31 MARCH 2023

- 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 General Funds represent 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. Grants and Restricted Funds can only be used for the procurement of items in respect of which the funding has been made.
- 4 As at 31st March 2023, the sum of £8,045.75 was ring fenced within the Cornwall Council Museum Donations Fund for the future development of The Museum of Cornish Life. 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 is based on the enclosed Financial Statements and is calculated as £57,024.50. Due to the unpredictability of energy costs, and noting that the Museum heating system is wholly based on electricity, the Trustees have decided to create a Special Reserve of £15,000 to protect SKHT CIO from energy price rises. This Special Reserve will be reviewed on a monthly basis and released as necessary over the coming 12 months. Note that the Museum Director is also assessing options for grant funding to improve the energy efficiency of the Museum building.

At the date of these Financial Statements the Trust has achieved this level of reserves.

- 6 As of 31st March 2023 the balances of all grants and restricted funds is listed below:

Art Fund	
CMP –Cutorial	775.00
Legacies	10,000.00
NPO Grant	20,823.51
Tanner Trust Grant	946.80
The Wild Escape	2,379.00
SKHT Maintenance Respons	8,045.75
	<u>42,970.06</u>

- 7 Summary of restricted funds including reserves

Reserves	57,024.50
Special Reserve	15,000.00
Grants and Restricted Funds	42,970.06
	<u>114,994.56</u>

Total Charity Funds as per balance sheet	132,395.56
Net free cash (General Funds)	17,401.00



Section A

Independent Examiner's Report

Report to the trustees

Charity Name

SOUTH KERRIER HERITAGE TRUST

On accounts for the year ended

31st MARCH 2023

Charity no (if any)

1151834

Set out on pages

3-5

(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

Responsibilities and basis of report

As the charity's trustees, 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 all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

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

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

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

Signed:

Claire Martin

Date:

31/8/23

Name:

CLAIRE MARTIN

Relevant professional qualification(s) or body

MAAT 1003572

(if any):

--

Address:

PERFECT SUMS BOOKKEEPING + ACCOUNTS Ltd
UNIT 5 TOLUACON ENERGY PAR
CAMBRIDGE TR14 0HX

Section B

Disclosure

Only complete if the examiner needs to highlight material 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.

--

SOUTH KERRIER HERITAGE TRUST

England & Wales - Charity number 1151834

Accounts

Trustees' Annual Report for the period

	Period start date				Period end date		
From	1st	April	2021	To	31st	March	2022

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	Phillip Woods	Trustee		South Kerrier Heritage Trust
9	Eilish Calnan	Trustee		South Kerrier Heritage Trust
10	Jenny Rose Lee	Trustee		South Kerrier Heritage Trust
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 2021 to 31st March 2022 and is the ninth 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 continued to develop under the leadership of Museum Director, Annette MacTavish. The Museum has recovered well from the impact of the Covid pandemic and consequent enforced periods of closure during 2020. Although not yet achieving the physical visitor numbers seen pre-pandemic the trajectory of recovery indicates visitor growth towards these prior levels.

Funding from the Arts Council (in partnership with Cornwall Museums Partnership and other Cornwall museums) for National Portfolio Organisation (NPO) has continued through this year based on a fourth year extension to the three year funding agreement.

In addition to the Museum Director's role funded by SKHT, the Museum continues to host a Community Engagement Curator, Apprentice and Trainee Curator funded by Arts Council England (through National Portfolio Organisation (NPO) funding for Cornwall Museums Partnership). This funding was based on a fifth-year extension to the NPO scheme, in response to Covid-19, following the original four-year funding agreement. Isobel King, the Community Engagement Curator has focused on giving our audiences the confidence to return to visiting with a focus on early years, families, schools and older people.

We are continuing to host Tasha Fullbrook as the Finds Liaison Officer for Cornwall. This role is funded by the British Museum with support from Cornwall Council to deliver the work of the Portable Antiquities Scheme. The Finds Officer has a remit across Cornwall recording archaeological finds discovered by members of the public and processing treasure cases.

A focus for the year has been on addressing collection management issues. In expanding this work, we successfully applied to the Art Fund and secured a curatorial Headley Fellowship. Dr. Tehmina Goskar is undertaking research into the following topics:

- history of the museum and its curators in Helston
- history of the old Camborne Museum in the Literary Institute (Donald Thomas Centre)
- toy and doll collection
- history of items from different parts of the UK and rest of the world (not from Cornwall)
- cultural representations in our photographic collections, including panto, carnival
- objects of violence, e.g. man and animal traps, agricultural and military items, and their representations.

Over the period we have continued to work in partnership. We have been working closely with Bodmin Keep and the Imperial War Museums on The Second World War and Holocaust Partnership project. In 2021 we

gathered stories from our community about the Second World War with a regular feature on Radio Cornwall and the establishment of a Podcast Channel. We also worked with WildWorks theatre to create an audio story about Cornwall in the Second World War that was displayed in the Imperial War Museums and then toured the UK.

In helping Helston's recovery from the pandemic, we supported a number of events funded through the Welcome Back Fund. This included a return of the Christmas Craft Fayre and Animation Festival (in partnership with MorMedia and Falmouth University), a St Piran's Day Lantern Parade, theatre performances by Coppice Theatre and Poetry Postie.

Our core team of over 60 volunteers have continued to help us welcome visitors to the museum, share the collection through digitising the collection, producing exhibitions. We also supported six volunteers undertaking their Bronze and Silver Duke of Edinburgh plus two student interns.

In terms of finances, SKHT has achieved a positive financial position for the period, assisted to a degree by a £12,000 Covid Recovery grant. No use of the Government's employee furlough scheme has been necessary.

The Trust is reporting an operating surplus of £14,880.85 on a turnover of £228,097.99.

These figures represent a decrease vs the previous year's surplus and turnover which were published as £17,318.26 and £270,219.25 respectively. However, it should be noted that the 2020/21 turnover figures included capital grant funding for the Museum Shop Refurbishment which, if excluded, results in a similar turnover for both reporting periods.

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 so a Reserve of £45,025.22 has been set aside in compliance with this policy.

In addition, the Trustees resolved to create a Special Reserve of £15,000 to provide for the potential for significant and unpredictable energy price increases expected through 2022/23. This Special Reserve was approved at the Board meeting of 26th July.

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	23 rd August 2022	



SOUTH KERRIER HERITAGE TRUST

UNAUDITED FINANCIAL STATEMENTS

FOR THE PERIOD 1ST APRIL 2021 TO 31ST MARCH 2022

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 2021

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)
Victoria Wiltshire
Sue Freeman
Phillip Woods
Elish Calnan
Jenny Rose Lee

Professional Advisers:

Bankers

Lloyds Bank
1 Market Place
Helston
TR13 8SU

Independent Examiner

Claire Martin MAAT
Perfect Sums Accounts Ltd

South Kerrier Heritage Trust - Helston Museum
Financial Activities
April 2021 - March 2022

	Total
Income	
Capital Grant Income	2,260.39
Grant Income	142,188.97
Business Rates Relief COVID Grant	12,000.00
Cornwall Council Management Fee	45,000.00
Total Grant Income	£ 199,188.97
Museum Income	
Education Income	2,345.48
Event Income	375.84
Gifts and Donations	11,914.91
Para Hen-Hellys - Membership	75.00
Sales Income	11,498.79
Total Museum Income	£ 26,210.02
Other Income	
Bank Interest Earned	8.44
Gift Aid	430.17
Total Other Income	£ 438.61
Total Income	£ 228,097.99
Total	£ 228,097.99
Expenditures	
Depreciation Expense	2,260.39
Total Employee Costs	£ 125,725.48
Overheads	
Accounts & Consultancy	2,935.00
Advertising	7,382.96
Bank Charges	237.19
Business Rates	164.00
Consumables	1,300.77
Contract Maintenance	4,978.88
Cost of sales	988.70
Education Expense`	2,293.66
Electricity & Water rates	15,135.68
Events	6.40
Feast Funding	8.00
Good for Resale - Stock	8,141.83
Insurance Expense	1,950.35
Office Expense	1,355.86
Office Expense & Postage	148.80
Project and cost of sales	33,116.27
Rent and Rates	216.00
Repairs & Maintenance	474.86
Subscriptions	1,226.33
Sundry Equipment	874.12
Telephone	1,651.15
Training	158.00
Net Income/(Expenditure)	14,880.85
Exceptional Income	
COVID Business Grant	12,000.00
	2,880.85

South Kerrier Heritage Trust - Helston Museum
Balance Sheet Summary
As of March 31, 2022

	Total
Fixed Asset	
Tangible assets	94,233.59
Non-Current Assets	0.00
Total Fixed Asset	£ 94,233.59
Cash at bank and in hand	126,493.19
Debtors	0.00
Current Assets	6,241.40
Net current assets	£ 132,734.59
Creditors: amounts falling due within one year	
Trade Creditors	0.00
Current Liabilities	28,900.89
Total Creditors: amounts falling due within one year	£ 28,900.89
Net current assets (liabilities)	£ 103,833.70
Total assets less current liabilities	£ 198,067.29
Creditors: amounts falling due after more than one year	4,584.17
Accruals and deferred income	62,889.82
Total net assets (liabilities)	£ 130,593.30
Charity funds	130,593.30

SOUTH KERRIER HERITAGE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE PERIOD 1ST APRIL 2021 TO 31 MARCH 2022

- 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 General Funds represent 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. Grants and Restricted Funds can only be used for the procurement of items in respect of which the funding has been made.
- 4 As at 31st March 2022, the sum of £8,045.75 was ring fenced within the Cornwall Council Museum Donations Fund for the future development of The Museum of Cornish Life. 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 is based on the enclosed Financial Statements and is calculated as £45,025.22. Due to the unpredictability of energy costs, and noting that the Museum heating system is wholly based on electricity, the Trustees have decided to create a Special Reserve of £15,000 to protect SKHT CIO from energy price rises. This Special Reserve will be reviewed on a monthly basis and released as necessary over the coming 12 months. Note that the Museum Director is also assessing options for grant funding to improve the energy efficiency of the Museum building.

At the date of these Financial Statements the Trust has achieved this level of reserves.

- 6 As of 31st March 2022 the balances of all grants and restricted funds is listed below:

Art Fund	13,256.70
Community Chest Fund	560.00
Imperial War Museum	4,417.54
Legacies	5,000.00
NPO Grant	-15,349.66
Signage Grant	2,351.33
SKHT Maintenance Respons	8,045.75
Tanner Trust Grant	946.80
Welcome Back Grant	120.00
	<u>19,348.46</u>

- 7 Summary of restricted funds including reserves

Reserves	45,025.22
Creditors	19,348.46
Special Reserve	15,000.00
Grants and Restricted Funds	<u>19,348.46</u>
	98,722.14

Total Charity Funds as per balance sheet	130,593.30
Net free cash (General Funds)	31,871.16



Section A

Independent Examiner's Report

Report to the trustees/
members of

SOUTH KERRIER HERITAGE TRUST

On accounts for the year
ended

31st March 2022

Charity no
(if any)

151834

Set out on pages

3-5.

(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 31/03/2022

Responsibilities and
basis of report

As the charity's trustees, 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 all 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 in connection with the examination (other than that disclosed below *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

Signed:

Date:

29/7/22

Name:

CLAIRE MARTIN

Relevant professional
qualification(s) or body

MAAT. 1003572

(if any):

Address: PERFECT SUMS BOOKKEEPING + ACCOUNTS Ltd.
UNITS TOLVADON ENERGY PARK
CAMBORNE TR14 0HX

Section B Disclosure

Only complete if the examiner needs to highlight material 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.

SOUTH KERRIER HERITAGE TRUST

England & Wales - Charity number 1151834

Accounts

Trustees' Annual Report for the period

Period start date			Period end date				
From	1st	April	2020	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	Resigned 12 th August 2020	South Kerrier Heritage Trust
9	Phillip Woods	Trustee		South Kerrier Heritage Trust
10	Eilish Calnan	Trustee	Appointed 27 th October 2020	South Kerrier Heritage Trust
11	Jenny Rose Lee	Trustee	Appointed 27 th October 2020	South Kerrier Heritage Trust
12				
13				
14				
15				
16				
17				
18				
19				

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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.



Section C Objectives and activities

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.

Summary of the main achievements of the charity during the year

This report covers the period from 1st April 2020 to 31st March 2021 and is the eighth 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 despite the impact of the Covid pandemic and enforced periods of closure.

Funding from the Arts Council (in partnership with Cornwall Museums Partnership and other Cornwall museums) for National Portfolio Organisation (NPO) has continued through this third year of the four-year funding agreement and has allowed staff to continue to work through lockdown periods, enabling them to develop a much broader and deeper on-line presence for the Museum. This has had a significant and positive impact in supporting the Museum's community, volunteers, and the public in general.

The forced closure periods have enabled the Museum Director to focus upon grant funding applications, especially related to the physical development of the Museum. In particular, success with the National Lottery Heritage Emergency Fund realised a £91,647 funded a full refurbishment of the reception and shop area of the Museum building which was completed in February 2021.

In addition to the Museum Director's role funded by SKHT, the Museum continues to host a Community Engagement Curator, Apprentice and Trainee Curator funded through NPO. This year saw a further two members of staff recruited, a Digital Intern (funded for 8 months through a collaborative project with the Imperial War Museums) and the Finds Liaison Officer for Cornwall (funded as part of the Portable Antiquities Scheme by the British Museum). The Finds Officer has a remit across Cornwall recording archaeological finds discovered by members of the public.

We continue to invest in digital marketing with active Twitter, Instagram and Facebook accounts. We have now embedded the offer of virtual guided tours of the Museum to residential homes. This service was extremely pertinent during the pandemic and was nominated for an award at the Museums Association. We created a wide range of digital content featuring exhibition tours, collection tours/films and making activities achieving 230,144 views.

Over the period we have continued to work in partnership. We have been working closely with Bodmin Keep and the Imperial War Museums on The Second World War and Holocaust Partnership project. In 2021 we have been gathering stories from our community about the Second World War with a regular feature on Radio Cornwall and the establishment of a new Podcast Channel. We also supported St Michael's Church to deliver the community elements of its National Lottery Heritage Fund Project with workshops, 'take and make' packs, exhibitions and a memory box.

Through the pandemic we retained our volunteers who came in during each open period and in addition worked remotely. We also supported four young people to achieve their Duke of Edinburgh Volunteering and supported two interns and a mentee from the University of Exeter. These young people worked remotely and in person at the Museum.

Our annual, physical visitor numbers have clearly been significantly impacted by the Covid pandemic; however, as noted above, we have seen excellent growth in our on-line engagements and now look to maintain these interactions whilst building back visitor numbers in 2021/22.

The Trustees are aware that physical visitor numbers, upon whom there is a significant reliance for cash income (donations, shop sales etc.), will take much of the coming year (2021/22) to recover, and have therefore made an additional 'Special Reserve' provision to ensure ongoing financial security (see reserve note below). The Trustees are therefore confident that the Trust is in a strong financial position to recover from the Covid issues of 2020/21.

In terms of finances, SKHT has achieved a positive financial position for the period, assisted to a degree by 'rates related' Covid support grants. No use of the Government's employee furlough scheme has been necessary.

The Trust is reporting an operating surplus of £17,318.26 on a turnover of £270,219.25.

This level of turnover represents an increase of approximately 67% vs prior year, reflecting the success achieved in raising grants for the development work done within the Museum as well as the partnering activities within the Helston community.

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. Due to the unusual effects on revenue expenditure caused by the Covid pandemic and related to project specific grants, the Trustees resolved to maintain the Normal Reserve at the same level as the prior year: £39,883.15.

In addition, the Trustees resolved to create a Special Reserve of £20,000 to provide for the potential slow recovery in visitor generated revenue expected through 2021/22.

A 'Normal and Exceptional Reserves Proposal' was approved at the Board meeting of 27th March with final approved document issued 20th April. This document is available by request from the Trust Secretary.

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


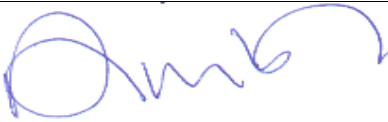
Other optional information

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	23 rd August 2021	



Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name

SOUTH KERRIER HERITAGE TRUST

On accounts for the year ended

31/3/21

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 DD / MM / YYYY.

Responsibilities and basis of report

As the charity's trustees, 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 all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

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

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

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

Signed:

[Signature]

Date:

20/7/21

Name:

MARIE RIDGE

Relevant professional qualification(s) or body

AAT - 10265646

(if any):

Address:

2ND FLOOR, 1 MENEAGE ST, HELSTON,

TR13 8TR

Section B

Disclosure

Only complete if the examiner needs to highlight material 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.