

# Trustees' Annual Report for the period

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

**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**

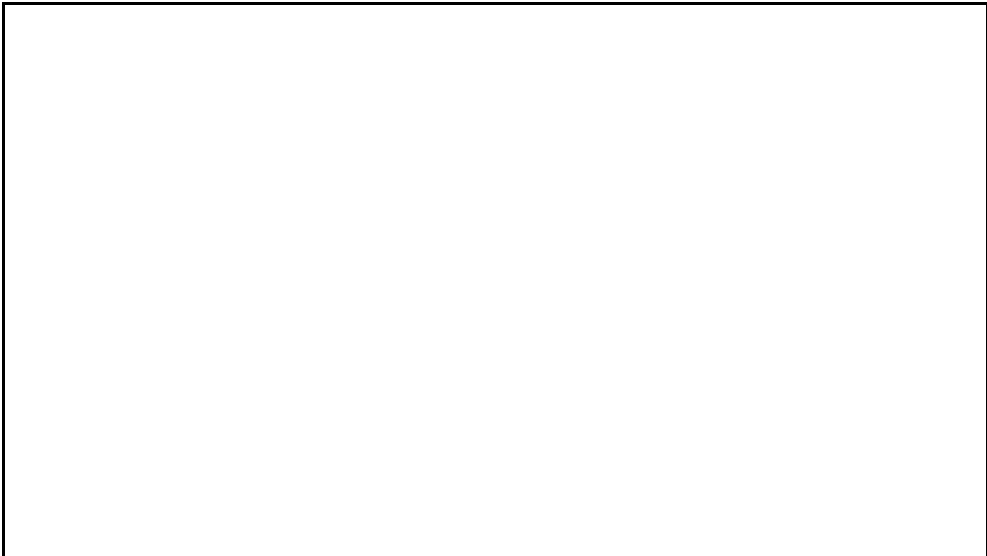
**Description of the charity’s trusts**

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)**

<p>You <b>may choose</b> to include additional information, where relevant, about:</p> <ul style="list-style-type: none"> <li>• policies and procedures adopted for the induction and training of trustees;</li> <li>• the charity’s organisational structure and any wider network with which the charity works;</li> <li>• relationship with any related parties;</li> <li>• trustees’ consideration of major risks and the system</li> </ul>	
---	--

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 1<sup>st</sup> April 2020 to 31<sup>st</sup> 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 27<sup>th</sup> March with final approved document issued 20<sup>th</sup> 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


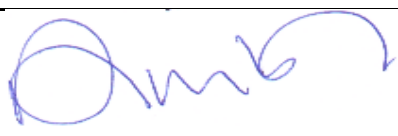
## Other optional information

## 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 <sup>rd</sup> August 2021	





CHARITY COMMISSION  
FOR ENGLAND AND WALES

## Independent examiner's report on the accounts

### Section A

### Independent Examiner's Report

Report to the trustees/  
members of

Charity Name

SOUTH KERRIER HERITAGE TRUST

On accounts for the year  
ended

31/3/21

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:

Date:

20/7/21

Name:

MARIE RIDGE

Relevant professional  
qualification(s) or body

AAT - 10265646

(if any):

Address:

2ND FLOOR, 1 MENEAGE ST, HEWSDON,  
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.