

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				
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.

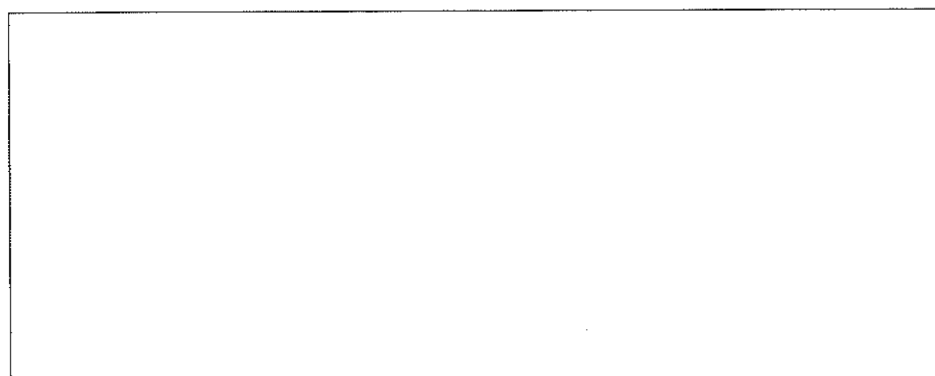
Following the transition from operation under Cornwall Council to management by SKHT in 2013, the Museum has enjoyed an increasing number of visitors and is now open 6 days per week. The Museum is well-supported by the local communities of Helston and the Lizard as well as attracting significant numbers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



Section D Achievements and performance

Section D	Achievements and performance
Summary of the main achievements of the charity during the year	<p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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</p> <p>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.</p> <p>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.</p> <p>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</p>

£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.

Section F

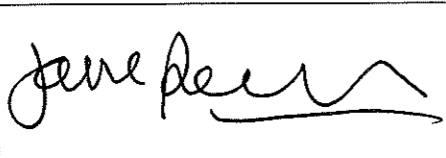
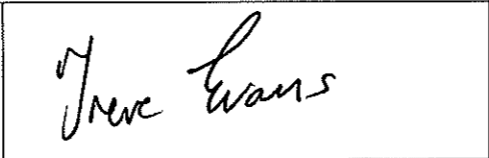
Other optional information

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)	Jane Reynolds	Treve Evans
Position (eg Secretary, Chair, etc)	Chair	Secretary

Date19th 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
Esme 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
	129,843.51

- 7 Summary of restricted funds including reserves

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



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:

Date:

7/10/25

Name:

CLAIRE MARTIN

Relevant professional
qualification(s) or body

MAAT 1003572

(if any):

Address:

UNITS WISAC AGAR.

TOLUADON ENERGY PARK

CAMBORNE TRI4 OHX

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.