



Trustees' Annual Report for the period

	Period start date				Period end date		
	01	04	2020		31	03	2021
From				To			

Section A

Reference and administration details

Charity name

The Jenner Trust

Other names charity is known by

Dr Jenner's House, Museum and Garden

Registered charity number (if any)

1158316

Charity's principal address

The Chantry

Church Lane

Berkeley

Postcode

GL13 9BN

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 C Statham	Chairperson		Jenner Trust Board
2 C Jenner	Treasurer		Jenner Trust Board
3 T Wallington			Jenner Trust Board
4 L Knott			Jenner Trust Board
5 Jon Finch			Jenner Trust Board
6 R Spencer		To 19.06.2020	Jenner Trust Board
7 Dominic Mellon		To 15.01.2021	Jenner Trust Board
8 Gabriella Swaffield		From 19.06.2020	Jenner Trust Board

9	Robin Markwell	From 17.07.2020	Jenner Trust Board
10	Richard Martin Rees	From 17.07.2020	Jenner Trust Board
11			
12			
13			

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

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

Owen Gower – General Manager

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution (Charitable Incorporated Organisation)
How the charity is constituted (eg. trust, association, company)	Trust
Trustee selection methods (eg. appointed by, elected by)	Appointed by Trust Board

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.

Induction and training of trustees:

Potential trustees are supplied with a prospectus that includes role descriptions, person specifications, eligibility, time commitment as well as information on the Trust's work, status and current trustees. They are sent the Trust's constitution and current forward plan. All trustees receive the Trust's constitution, AIM Golden Rules for Good Governance, The Essential Trustee, and the Accreditation Scheme for Museums and Galleries in the UK as well as a Code of Conduct to which they must agree and Essential Trustee training.

Organisational Structure:

Dr Jenner's House, Museum and Garden has a full-time manager assisted by a part time finance officer, cleaning and front of house staff and 31 volunteers. The manager answers to the board through a designated trustee. This work is supported by volunteers in the fields of visitor services, collections care, archives, gardening and education.

Relationships:

The trust is supported by the British Society for Immunology (BSI), the Centre for Disease Control (CDC), the London School of Hygiene & Tropical Medicine, Public Health England, Reading University and Bristol University.

Consideration of risks:

These are considered in the forward planning cycle part of the meetings program for the Trust Board.

Section C

Objectives and activities

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

The Jenner Trust has a clear charitable purpose as set out in its Constitution:

- (1) The principal object of the CIO is to preserve the property known as The Chantry at Berkeley in the County of Gloucestershire being the property wherein the late Dr Edward Jenner (1749-1823) ("**Edward Jenner**") lived and died:
 - (a) as a permanent memorial to Edward Jenner his life and his work (both in local community affairs and in Immunology) and his memory; and also
 - (b) as a Centre for the advancement of Education with particular reference to the study of Immunology and including the eradication of disease by immunological means; and
 - (c) for other purposes beneficial to the local community of Berkeley and the Community at large.

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

- (2) The further objects of the CIO are:
- (a) the maintenance improvement and endowment of The Chantry or other suitable property for the housing for the public benefit of a museum library historical documents papers objects and memorabilia associated with the life of Edward Jenner and as a Centre for the further charitable objects detailed in this clause 3 (Objects) as the charity trustees see fit; and
 - (b) to maintain and manage and co-operate with other persons or body of persons in the maintenance and management of The Chantry or such other property so purchased for such purposes detailed in this clause 3 (Objects) and as a Centre for Education with particular reference to Immunology and also for other charitable purposes beneficial to the inhabitants of the town of Berkeley (without reference to age sex religion or political persuasion) and the Community at large.

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)

In determining the program of activities to be undertaken by Dr Jenner's House, Museum and Garden the trustees work within the guidance issued by the Charity Commission in 2013 on public benefit.

Priorities are: -

To preserve The Chantry for the world and as a base from which we celebrate the ongoing legacy of the pioneering scientist Edward Jenner and encourage others to follow in his footsteps.

To celebrate vaccination from the place where it began; to maintain continuity of services to the public including an open season including any visits and events as permitted by Covid-19 restrictions and operational viability (staffing and volunteer numbers), and educational program.

To ensure Edward Jenner's story is told beyond the walls of the building by exploring and developing our virtual/online offering to reach a wider audience and enabling conversations which can change the world.

To enhance the presentation of Edward Jenner's life, work and legacy by fostering curiosity and experimentation, and inspiring current and future scientists.

To maximise the use of volunteers to deliver the work of the Trust.

To improve the diversity of experience on the Trust's Board.

To market Dr Jenner's House Museum and Garden effectively to maximise visitor engagement and financial contributions.

To continue our positive financial trajectory and increase our unrestricted financial reserves.

To attract grants and donations to support both the operation and development of Dr Jenner's House Museum and Garden.

These ongoing activities are set out in more detail in the Trust's forward plan. The Board of Trustees pays full attention to the Charity Commission guidance on public benefit in planning and subsequent monitoring of these activities.

Activity 1: To develop an organisation that can secure a sustainable future for the Museum and wider activities of the Trust

1.1 Recruit new board members to complement and enhance the skills of the Trustees of The Jenner Trust.

1.2 Continue to build on our improving financial situation.

1.3 Grow our volunteer team, increase the range of opportunities available and expand volunteer involvement within all areas of the organisation.

Activity 2: To enhance levels of self-generated income and explore opportunities to generate new sources of funding.

- 2.1 Increase shop, conference, and event income through new merchandise, an enhanced offer to groups and conference guests, and changes to our events programme.
- 2.2 Create an online shop to extend our consumer base.
- 2.3 Investigate and apply for funding and schemes supporting sustainable business improvements.

Activity 3: To develop new audiences supported by effective marketing.

- 3.1 Continue to improve our external branding and presentation.
- 3.2 Revitalise our education programme for schools and universities.
- 3.3 Increase visitor numbers both at the Chantry and to virtual events.
- 3.4 Review our external communications to support our core objectives and improve engagement.

Activity 4: To enhance the visitor experience to the House and Garden

- 4.1 Identify key areas of improvement to engagement and interpretation and how this can be best delivered.
- 4.3 Identify and source funding.
- 4.3 Research and scope the redevelopment of the garden and its interpretation.
- 4.4 Identify and develop a long term plan for the buildings to include their maintenance and repair as well as development.
- 4.5 Identify likely phasing and sources of funding.

Activity 5: To preserve and develop our collections relating to Edward Jenner and the history of immunology and vaccination.

- 5.1 Upgrade documentation in prioritised areas: loans, cataloguing, handling, rationalisation
- 5.2 Deliver deep clean – objects on display and in store
- 5.3 Deliver improvements to care and conservation of stored objects.
- 5.4 Undertake research to increase our knowledge of the museum's collection and story.

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.

Improved governance measures have been put in place, with increased training for new trustees and a new Code of Conduct for trustees, staff and volunteers.

In January 2020, a Strategic Review was completed (funded with Heritage Lottery Fund grant) to identify a sustainable way forward for the Trust and Museum, with a view to improving the Trust's financial resilience long-term. A revised Forward Plan has been developed based on these findings, with a revised organisation structure, income-generation model and focus. Funding has been secured to undertake the first element of this new recruitment for fundraising and business development consultants; these persons are now in post and working to improve the museum's fundraising and income-raising capacity.

A focused fundraising drive via Crowdfunder April-June 2020 proved very successful, raising £44,166 and providing a good source of digital engagement globally.

Mentoring has been offered to senior staff.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

Dr Jenner's House, Museum and Garden has provided a full complement of services and it has continued to implement its plans for long term sustainability.

Due to Covid-19 restrictions the museum has been closed to visitors this year. As a result in-person visitor numbers for this period are 0 (zero). However, our online offerings were well-attended (Jenner Conversations held in September 2020), Discovery Day at Home (also September 2020) and joint Quarantines, Vaccines and Museums event with Eyam Museum, hosted by historian Rebecca Rideal, in February 2021, which had over 200 attendees. These events continue to be available to share and watch online.

Total visitors 0

Open season walk in visitors 0

Schools and other educational groups 0

Organised group visitors 0

Attending talks and other events >200 (unable to track reach of online events accurately)

Attending conferences 0

(Data for 01/04/20 to 31/03/21 shows all zero as museum closed due to the pandemic)

The Trust Board meet quarterly and 2 trustees have stepped down and 3 new joined. The recruitment of new trustees is focused on providing a more diverse range of trustee experience that is more reflective of the Trust's needs. This is promoted through www.jennermuseum.com, and other avenues such as AIM and LinkedIn.

A new Forward Plan is now in use for the period 2020-2025. This is under regular review and is being adapted to align with the recommendations of

Section D

Achievements and performance

specialist fundraising and business development advice.

To be sustainable, Dr Jenner's House, Museum and Garden must maintain its high quality of service, increase income and develop a model of working which consistently balances and grows its core budget. We have continued a heightened programme of fundraising. For the financial year ending 31/03/21 unrestricted overall income exceeded expenditure by £74,325. This was a combination of online shop-spend, pre-purchased tickets for future visits and increased fundraising.

We realised our ambition for an online shop which has proved very successful in its first year of operation.

We continue to improve our programme for maximising volunteer participation and this remains key to the museum's sustainability. Covid-restrictions and events has impacted our volunteer numbers slightly, with the total decreasing from 34 (last year) to 31. We have continued to support and engage our volunteers throughout.

We have undertaken rigorous research and engaged with key academic and museum partners to increase our knowledge of the museum's collection and story, resulting in significant outreach and media opportunities during the 2020 global health emergency as a need for trusted information arose.

We have engaged with and received publicity through BBC Radio 4, The New York Times, Private Eye, The Guardian, The Daily Telegraph, BBC Radio Gloucestershire, BBC Points West, ITV West Country, and many others.

Fundraising has continued. A Crowdfunding campaign was completed, bringing in over £44,000 in donations from individuals across the world to date with the campaign continuing. We also received support from the Arts Council and local authority Covid-relief measures.

The Trust remains accredited under the Accreditation Scheme for Museums and Galleries in the UK. We are also institutional members of the Museums Association, Association of Independent Museums and the South West Federation of Museums and Galleries. We have retained our TripAdvisor Certificate of Excellence.

Overall Dr Jenner's House, Museum and Garden has continued to provide an excellent quality, if reduced quantity, of services throughout the Covid pandemic, at the same time as working towards a sustainable long-term future. This is reflected in global support and interest in the museum.

Section E

Financial review

Brief statement of the charity's policy on reserves

The Trust's reserves policy is to hold approximately six months unrestricted expenditure.

Details of any funds materially in deficit

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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.

We have continued to increase our operating profit this year, which represents a huge achievement on the part of the staff, board and volunteers. This has been achieved through a mixture of budget-management, fundraising and Covid-support, alongside clearer targets and goals for income generation. This provides a stronger starting position to the next financial year during which we hope to continue this upward trajectory.

We invested in capital repairs to part of our roof and a refurbishment of our on-site apartment, which has resulted in new tenants and increased monthly rental amount.

We invested in fundraising expertise that will support our growth going forwards.

Section F

Other optional information

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Section G

Declaration

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

Signed on behalf of the charity's trustees

Signature(s)

	<i>Carl Jenner</i>
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Full name(s)

Catherine Denise Statham	Carl Peter Jenner
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Position (eg Secretary, Chair, etc)

Chair	Treasurer
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Date

20/01/2022



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

**Independent examiner's
report on the accounts**

Section A Independent Examiner's Report

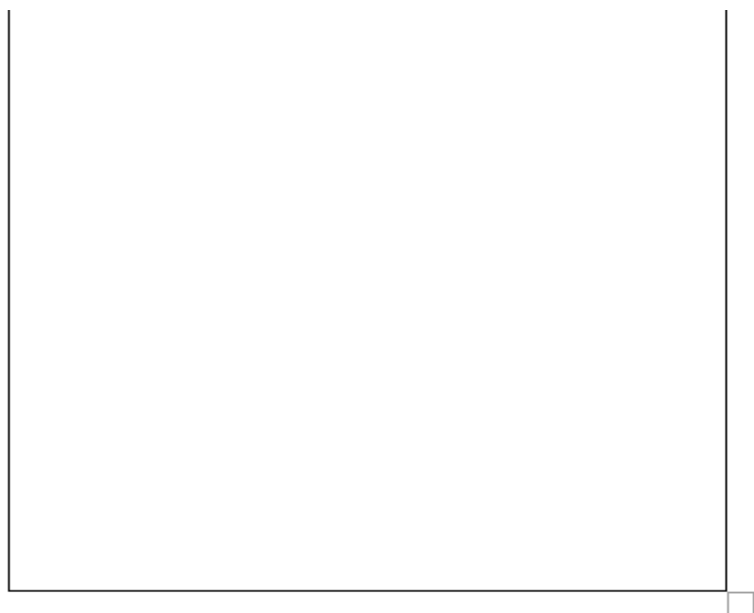
Report to the trustees/ members of	The Jenner Trust		
On accounts for the year ended	31/03/21	Charity no (if any)	1158316
Set out on pages	1 to 5 attached to this report <small>(remember to include the page numbers of additional sheets)</small>		
	I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2021.		
Responsibilities and basis of report	As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").		
	I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.		
Independent examiner's statement	<p>I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:</p> <ul style="list-style-type: none"> accounting records were not kept in accordance with section 130 of the Act or the accounts do not accord with the accounting records <p>I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.</p> <p><i>* Please delete the words in the brackets if they do not apply.</i></p>		
Signed:	KE Johnson	Date:	15/10/21
Name:	Katie Elizabeth Johnson		
Relevant professional qualification(s) or body (if any):	n/a		
Address:	6 Orchard Close, Middleward, Kings Stanley, Glos. GL10 3QA		

Section B Disclosure

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

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

n/a



BALANCE SHEET AS AT 31 MARCH 2021

	Note	2020/21	2019/20
		£	£
<u>FIXED ASSETS</u>			
Tangible assets		1,501,354	1,501,354
Investments		0	0
		<u>1,501,354</u>	<u>1,501,354</u>
<u>CURRENT ASSETS</u>			
Stocks	3,407		2,098
Prepayments	0		0
Debtors	2,716		2,435
Cash at bank	153,948		61,653
	<u>160,072</u>		<u>66,186</u>
<u>CREDITORS</u>			
Amounts falling due within one year	-1,104		-5,381
NET CURRENT ASSETS		<u>158,968</u>	<u>60,805</u>
NET ASSETS		<u><u>1,660,322</u></u>	<u><u>1,562,159</u></u>
<u>CHARITY FUNDS</u>			
Endowment funds	500,000		500,000
Rest-d funds	25,000		1,162
UnRest-d funds	1,135,322		1,060,997
	<u>1,660,322</u>		<u>1,562,159</u>

Income & expenditure account for the year ended 31/03/21

		Rest-d funds 2020/21 £	UnRest-d funds 2020/21 £	Total funds 2020/21 £	Total funds 2019/20 £
INCOME	Ref				
Donations	I-01	0	123,658	123,658	22,103
Grants	I-02	41,600	0	41,600	20,358
Subtotal Voluntary Income		41,600	123,658	165,258	42,461
Rental income	I-03		3,452	3,452	7,800
Income from investments	I-04		0	0	0
Bank interest	I-05		121	121	412
Investment Income		0	3,573	3,573	8,212
Sales and gate receipts	I-06		6,019	6,019	32,648
Conferences	I-07		150	150	1,826
Copyright	I-08		334	334	85
Education workshops	I-09		0	0	6,979
Filming & investigations	I-10		0	0	0
Events	I-11		0	0	5,029
Other	I-12		1,760	1,760	3,829
Income from Charitable Activities		0	8,263	8,263	50,396
TOTAL INCOMING RESOURCES		41,600	135,494	177,094	101,070
Investment management costs	E-01	0	0	0	0
Investment management costs		0	0	0	0
Rent & rates	E-02		1,257	1,257	2,775
Utilities	E-03		2,201	2,201	5,061
Repairs & maintenance	E-04		12,826	12,826	7,074
Insurance	E-05		2,644	2,644	2,582
Loss on disposal	E-06			0	0
Telephone	E-07		746	746	813
Conference costs	E-08			0	451
Stock items & sundry expenses	E-09		251	251	3,295
Education programme costs	E-10			0	137
Specified donations costs	E-11			0	0
Advertising & marketing	E-12		419	419	3,192
Wages & salaries	E-13		35,662	35,662	45,041
Bank charges & interest	E-14		645	645	787
Subscriptions & memberships, service contracts	E-15		4,039	4,039	1,281
Travel expenses & internal catering	E-16			0	87
Printing, postage & stationery	E-17		479	479	3,202
Depreciation	E-18			0	0
Grant expenditure	E-19	17,762		17,762	29,176
Charitable activities		17,762	61,169	78,930	104,954
Independent examination	E-21			0	0
Auditors fees - non-audit	E-21			0	0
Trustees expenses re-imbursed	E-22			0	0
Governance costs		0	0	0	0
TOTAL RESOURCES EXPENDED		17,762	61,169	78,930	104,954
NET RESOURCES EXPENDED BEFORE REVALUATIONS		23,838	74,325	98,163	-3,884
Gains/Losses on revaluations of investments		0	0	0	0
NET MOVEMENTS IN FUNDS FOR THE YEAR		23,838	74,325	98,163	-3,884

Fixed Assets Analysis at 31/03/21

TANGIBLE FIXED ASSETS	Freehold Property £	Fixtures & Fittings £	Exhibitions £	Total £
COST				
At 01/04/20	1,500,000	23,278	27,754	1,551,032
Disposals				0
At 31/03/21	1,500,000	23,278	27,754	1,551,032
DEPRECIATION				
At 01/04/20	0	21,123	27,754	48,877
Charge for the year	0	801	0	801
At 31/03/21	0	21,924	27,754	49,678
NET BOOK VALUE				
At 31/03/21	1,500,000	1,354	0	1,501,354
At 31/03/20	1,500,000	1,354	0	1,501,354

Restricted Funds Analysis at 31 March 2021

	CDC Smallpox Zero £	Magnox Grant £	Refurbishment of Flat £	Heritage Grant £	Charles Skey Trust £	Total £
Opening Balance at 1 April 2020	7,035	717	0	-6,590	0	1,162
Income 2020/21				16,600	25,000	41,600
T/fer to Flat Refurbishment	-7,035	-717	7,752			0
Subtotal	0	0	7,752	10,010	25,000	42,762
<u>Expenditure - Charged in Year</u>						
Salaries				5,504		5,504
Other / Equipment				4,506		4,506
T/fer to Flat Refurbishment Project			7,752			7,752
	0	0	7,752	10,010	0	17,762
Closing Balance 31 March 2021	0	0	0	0	25,000	25,000

STATEMENT OF FINANCIAL ACTIVITIES AT 31 MARCH 2021

	Endowment funds 2020/21 £	Rest-d funds 2020/21 £	UnRest-d funds 2020/21 £	Total funds 2020/21 £	Total funds 2019/20 £
<u>INCOMING RESOURCES</u>					
Voluntary income	0.00	41,600.00	123,657.96	165,257.96	42,461
Investment income	0.00	0.00	3,573.11	3,573.11	8,212
Income from charitable activities	0.00	0.00	8,262.66	8,262.66	50,396
TOTAL INCOMING RESOURCES	0.00	41,600.00	135,493.73	177,093.73	101,070
<u>RESOURCES EXPENDED</u>					
Cost of generating funds	0.00	0.00	0.00	0.00	0
Investment management costs	0.00	17,761.84	61,168.55	78,930.39	104,954
Charitable activities	0.00	0.00	0.00	0.00	0
Governance costs	0.00	0.00	0.00	0.00	0
TOTAL RESOURCES EXPENDED	0.00	17,761.84	61,168.55	78,930.39	104,954
NET RESOURCES EXPENDED BEFORE REVALUATIONS	0.00	23,838.16	74,325.18	98,163.34	-3,884
Gains/Losses on revaluations of investments	0.00	0.00	0.00	0.00	0
NET MOVEMENTS IN FUNDS FOR THE YEAR	0	23,838	74,325	98,163	-3,884
Total funds at 01 APRIL 2020 (B/Fwd)	500,000	1,162	1,060,997	1,562,159	1,566,043
TOTAL FUNDS AT 31 MARCH 2021	500,000	25,000	1,135,322	1,660,322	1,562,159