



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From 01/04/2024 Period start date 31/03/2025 Period end date

Charity name: The Jenner Trust

Charity registration number: 1158316

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>The Jenner Trust has a clear charitable purpose as set out in its Constitution:</p> <p>(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:</p> <p>(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</p> <p>(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</p> <p>(c) for other purposes beneficial to the local community of Berkeley and the Community at large.</p> <p>(2) The further objects of the CIO are:</p> <p>(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and endowment of The Chantry or other suitable property for the housing for the public benefit of a museum library historical documents papers objects and memorabilia associated with the life of Edward Jenner and as a Centre for the further charitable objects detailed in this clause 3 (Objects)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</p> <p>(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.</p>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or	Para 1.17 and 1.19	<p>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.</p> <p>Priorities are: -</p>

<p>services identified in the accounts.</p>		<ul style="list-style-type: none"> <li>• 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.</li> <li>• To celebrate vaccination from the place where it began; to maintain continuity of services to the public including an open season including any visits, events and educational program.</li> <li>• 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.</li> <li>• To enhance the presentation of Edward Jenner's life, work and legacy by fostering curiosity and experimentation, and inspiring current and future scientists.</li> <li>• To maximise the use of volunteers to deliver the work of the Trust.</li> <li>• To improve the diversity of experience on the Trust's Board.</li> <li>• To market Dr Jenner's House Museum and Garden effectively to maximise visitor engagement and financial contributions.</li> <li>• To continue our positive financial trajectory and increase our unrestricted financial reserves.</li> <li>• To attract grants and donations to support both the operation and development of Dr Jenner's House Museum and Garden.</li> </ul> <p>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.</p> <p><b>Activity 1: To develop an organisation that can secure a sustainable future for the Museum and wider activities of the Trust</b></p> <p>1.1 Recruit new board members to complement and enhance the skills of the Trustees of The Jenner Trust.</p> <p>1.2 Continue to build on our improving financial situation.</p> <p>1.3 Grow our volunteer team, increase the range of opportunities available and expand volunteer involvement within all areas of the organisation.</p> <p>1.4 To create a vision for our next 5 years, 2025-2030 which is compelling and celebrates our global status as the home of vaccination</p>
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		<p><b>Activity 2: To enhance levels of self-generated income and explore opportunities to generate new sources of funding.</b></p> <p>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.</p> <p>2.2 Create an online shop to extend our consumer base.</p> <p>2.3 Investigate and apply for funding and schemes supporting sustainable business improvements.</p> <p><b>Activity 3: To develop new audiences supported by effective marketing.</b></p> <p>3.1 Continue to improve our external branding and presentation.</p> <p>3.2 Revitalise our education programme for schools and universities.</p> <p>3.3 Increase visitor numbers both at the Chantry and to virtual events.</p> <p>3.4 Review our external communications to support our core objectives and improve engagement.</p> <p><b>Activity 4: To enhance the visitor experience to the House and Garden</b></p> <p>4.1 Identify key areas of improvement to engagement and interpretation and how this can be best delivered.</p> <p>4.3 Identify and source funding.</p> <p>4.3 Research and scope the redevelopment of the garden and its interpretation.</p> <p>4.4 Identify and develop a long-term plan for the buildings to include their maintenance and repair as well as development.</p> <p>4.5 Identify likely phasing and sources of funding.</p> <p><b>Activity 5: To preserve and develop our collections relating to Edward Jenner and the history of immunology and vaccination.</b></p> <p>5.1 Upgrade documentation of prioritised areas, loans, cataloguing, handling and rationalisation</p> <p>5.2 Deliver deep clean of objects on display and in store</p> <p>5.3 deliver improvements to care and conservation of stored objects</p> <p>5.4 Undertake research to increase our knowledge of the museums' collection. And story</p>
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Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Yes - trustees have had regard to the to the guidance issued by the Charity Commission on public benefit

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	The Jenner Trust does not make grants
Policy on social investment including program related investment	Para 1.38	N/A
Contribution made by volunteers	Para 1.38	Our 24/25 recruitment drive has successfully increased our volunteer numbers which continue to increase.  The dedicated group of 35 volunteers continue to support the museum to provide front-on-house and house stewarding, together with garden maintenance, archive conservation and events.
Other		

## Achievements and Performance

	SORP reference	
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Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>The Jenner Trust continues to share the story of Dr Edward Jenner, the place where he lived and developed his amazing discoveries and to promote the legacy of his works.</p> <p>24/25 has been a very successful year as our new team and Trustees have become established. The open season in 2024 saw a slight increase in visitor numbers but less than was hoped for, this seems to be a consistent factor across the whole museum community.</p> <p>This has impacted the financial results, but it is hoped that with improved publicity visitor numbers will increase for 25/26</p> <p>We completed our objective to shift our emphasis, using the arts as a medium to communicate science. In the autumn we installed our bequest of fine furniture, paintings and domestic items into our downstairs rooms to recreate the homely atmosphere of a country doctor's life in the late 1700s which has been well received.</p> <p>The Cotswold Sculpture Association was inspired by Dr Jenner's experiments and created 20 sculpture to highlight aspects of vaccination which will be on display in the garden throughout the summer of 2025.</p> <p>A professional playwright has written a play "Pox" which we plan to have as a summer event in 2025</p> <p>We have rekindled our relationship with the Berkeley community and now hold regular Yoga, fitness and arts sessions in the conference room.</p> <p>The Berkeley Harriers held "The Jenner Jog" a 10k run from Dr Jenner's Hosue with over 100 runners, an event which will now be held annually.</p> <p>We have applied for a £220k National Lottery Heritage Fund grant to start the restoration of the site and our application for UNESCO World Heritage Status has been submitted.</p>
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### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	The work of the grant funded Learning & Education Officer continues in developing and leading our educational activities. Educational visits to the museum have increased, as well as engaging with our educational materials off-site/remotely.
Performance of fundraising activities against objectives set	Para 1.41	Fundraising has again been hard in a challenging economic climate it has been slower than hoped. A legacy of £15k and

		anonymous donation of £25k have been gratefully received.
Investment performance against objectives	Para 1.41	The Trust does not make investments aside from having interest bearing deposit accounts.
Other		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The year ended 31/03/25 shows significant financial improvement reducing our annual loss to £6473. Ticket sales are slightly increased, but the cost of staff wages and essential repairs account for most of the overspend.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The Trust's reserve policy is to hold approximately 3 months unrestricted expenditure.
Amount of reserves held	Para 1.22	
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	None

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	The main source of income is from tickets sales from opening the museum to the general public and groups. This is supplemented by rental income from a flat within the museum and car parking spaces. In addition to this the museum benefits from donations from supporters.
Investment policy and objectives including any social investment policy adopted	Para 1.46	Any museum funds are kept in interest bearing deposit accounts, no other investment activity takes place.
A description of the principal risks facing the charity	Para 1.46	Ticket income is lower than planned and donations from supporters do not materialise. Risk of a major building repair could cause strain of the museum financial reserves if significant.
Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document ( <a href="#">trust deed</a> , <a href="#">royal charter</a> )	Para 1.25	Constitution
How is the charity constituted? (e.g <a href="#">unincorporated association</a> , CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Appointed by The Jenner Trust Board at a full meeting which are held every three months

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

## Reference and Administrative details

Charity name	The Jenner Trust
Other name the charity uses	None
Registered charity number	1158316
Charity's principal address	The Chantry Church Lane Berkeley 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	Jonathan Steel	Chairman		The Jenner Trust
2	Carl Jenner	Treasurer		The Jenner Trust
3	Tim Wallington			The Jenner Trust
4	Fergus Conolly			The Jenner Trust
5	Dan Bird		Resigned 1 <sup>st</sup> Jan 2025	The Jenner Trust
6	Cate Statham			The Jenner Trust
7	Isobel Milne			The Jenner Trust
8	Dianne Budden		Appointed March 2025	The Jenner Trust
9				
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20				

**Corporate trustees – names of the directors at the date the report was approved**

Director name		
None		

**Name of trustees holding title to property belonging to the charity**

Trustee name	Dates acted if not for whole year	
None		

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	None
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	None

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
	None	

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

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## Exemptions from disclosure

Reason for non-disclosure of key personnel details

N/A
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## Other optional information

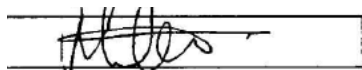
None
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## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Dr Jonathan Steel	Carl Jenner
Position (eg Secretary, Chair, etc)	Chairman	Treasurer
Date	xxxxxxx	



# **The Jenner Trust**

**Annual Accounts**

**for the period**

**01/04/24 to 31/03/25**

**BALANCE SHEET AS AT 31 MARCH 2025**

	Note	2024/25	2023/24
		£	£
<b><u>FIXED ASSETS</u></b>			
Land, buildings & equipment		1,501,354	1,501,354
Collection furniture & contents		222,100	0
		<u>1,723,454</u>	<u>1,501,354</u>
<b><u>CURRENT ASSETS</u></b>			
Stocks	3,137		3,152
Prepayments	0		0
Debtors	1,504		6,464
Cash at bank	80,986		84,167
	<u>85,627</u>		<u>93,783</u>
<b><u>CREDITORS</u></b>			
Amounts falling due within one year	-4,937		-163
NET CURRENT ASSETS		<u>80,690</u>	<u>93,619</u>
<b>NET ASSETS</b>		<u><u>1,804,144</u></u>	<u><u>1,594,973</u></u>
<b><u>CHARITY FUNDS</u></b>			
Restricted funds	8,442		11,799
Un-Restricted funds	80,986		84,167
Heritage Assets (See Note 1)	1,714,717		1,499,008
	<u>1,804,144</u>		<u>1,594,973</u>

Note 1 : The balance of Heritage Assets are mainly represented by the land and buildings of the trust.

## Income & expenditure account for the year ended 31/03/25

	Restricted Funds 2024/25 £	Un-restricted Funds 2024/25 £	Total Funds 2024/25 £	Total Funds 2023/24 £
<b>INCOME</b>				
Donations	0	43,326	43,326	4,345
Grants	4,967	0	4,967	0
<b>Subtotal Voluntary Income</b>	<b>4,967</b>	<b>43,326</b>	<b>48,292</b>	<b>4,345</b>
Rental income	0	13,892	13,892	13,817
Bank interest	0	1,407	1,407	1,158
<b>Investment Income</b>	<b>0</b>	<b>15,299</b>	<b>15,299</b>	<b>14,975</b>
Sales and gate receipts	0	28,284	28,284	25,019
Conferences	0	420	420	420
Education workshops	0	10,342	10,342	7,789
Events	0	409	409	483
Other	0	0	0	0
<b>Income from Charitable Activities</b>	<b>0</b>	<b>39,454</b>	<b>39,454</b>	<b>33,712</b>
<b>TOTAL INCOMING RESOURCES</b>	<b>4,967</b>	<b>98,079</b>	<b>103,046</b>	<b>53,032</b>
Rent & rates	0	161	161	25
Utilities	0	15,017	15,017	4,392
Repairs & maintenance	0	4,931	4,931	12,999
Insurance	0	3,883	3,883	3,786
Telephone	0	1,064	1,064	1,346
Conference costs	0	115	115	0
Stock items & sundry expenses	0	4,195	4,195	2,321
Education programme costs	0	0	0	155
Specified donations costs	0	0	0	684
Advertising & marketing	0	2,263	2,263	396
Wages & salaries	8,324	60,433	68,757	66,523
Bank charges & interest	0	839	839	1,245
Subscriptions & memberships, service contracts	0	5,296	5,296	4,364
Travel expenses & internal catering, training	0	1,209	1,209	1,143
Printing, postage, stationery, office equipment	0	2,411	2,411	2,550
Consultancy costs	0	920	920	0
Exhibition costs	0	4,021	4,021	0
Grant expenditure	0	0	0	0
<b>TOTAL RESOURCES EXPENDED</b>	<b>8,324</b>	<b>106,758</b>	<b>115,082</b>	<b>101,931</b>
<b>NET RESOURCES EXPENDED BEFORE REVALUATION:</b>	<b>-3,357</b>	<b>-8,679</b>	<b>-12,036</b>	<b>-48,899</b>
Gains/Losses on revaluations of investments		0	0	0
<b>NET MOVEMENTS IN FUNDS FOR THE YEAR</b>	<b>-3,357</b>	<b>-8,679</b>	<b>-12,036</b>	<b>-48,899</b>

TANGIBLE FIXED ASSETS	Freehold Property £	Collection Furniture £	Fixtures & Fittings £	Exhibitions £	Total £
<b>COST</b>					
At 01/04/24	1,500,000	0	23,278	27,754	1,551,032
Additions		222,100		0	222,100
Disposals					0
At 31/03/25	1,500,000	222,100	23,278	27,754	1,773,132
<b>DEPRECIATION</b>					
At 01/04/24	0	0	21,924	27,754	49,678
Charge for the year					0
At 31/03/25	0	0	21,924	27,754	49,678
<b>NET BOOK VALUE</b>					
At 31/03/25	1,500,000	222,100	1,354	0	1,723,454
At 31/03/24	1,500,000	0	1,354	0	1,501,354

**Restricted Funds Analysis at 31 March 2025**

	GEM Art Scholars £	Royal Society Outreach Project £	STEM Funding £	Total £
Opening Balance at 1 April 2024	0	0	11,799	11,799
Income 2023/24	1466.66	3500		4,967
<b>Subtotal</b>	<b>1,467</b>	<b>3,500</b>	<b>11,799</b>	<b>16,765</b>
<b><u>Expenditure - Charged in Year</u></b>				
Salaries	0	0	8,324	8,324
Other	0	0	0	0
	<b>0</b>	<b>0</b>	<b>8,324</b>	<b>8,324</b>
<b>Closing Balance 31 March 2025</b>	<b>1,467</b>	<b>3,500</b>	<b>3,475</b>	<b>8,442</b>





**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	31/03/25	Charity no (if any)	1158316
Set out on pages	1 to 4 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 30/06/24.		
Responsibilities and basis of report	As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").		
	I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.		
Independent examiner's statement	I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect: <ul style="list-style-type: none"> <li>• accounting records were not kept in accordance with section 130 of the Act or</li> <li>• the accounts do not accord with the accounting records</li> </ul>		
	I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached. * Please delete the words in the brackets if they do not apply.		
Signed:	<i>KE Johnson</i>	Date:	17/12/25
Name:	Katie Elizabeth Johnson		
Relevant professional qualification(s) or body (if any):	n/a		
Address:	6 Orchard Close, <del>Middlewood</del> , Kings Stanley, Glos, GL10 3QA		



**Section A**

**Independent Examiner's Report**

**Report to the trustees/  
members of**

**The Jenner Trust**

**On accounts for the year  
ended**

31/03/25

**Charity no  
(if any)**

1158316

**Set out on pages**

1 to 4 attached to this report

*(remember to include the page numbers of additional sheets)*

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30/06/24.

**Responsibilities and  
basis of report**

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent  
examiner's statement**

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

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

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

**Signed:**

**Date:**

**Name:**

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

**Address:**

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