

THE ATKINSON DEVELOPMENT TRUST

Improving local people's lives through art and heritage



Photo credit: Matt Dodd

Trustees' Annual Report 2020-2021

The Atkinson Development Trust
Trustees' Annual Report
for the period 1 April 2020 to 31 March 2021

Reference and Administrative Details

Charity name: The Atkinson Development Trust

Registered charity number: 1161020

Principal address:

The Atkinson
Lord Street
Southport
MERSEYSIDE
PR8 1DB

Trustees:

Jo Kay (Chair)
Samantha Browne (Administrator)
Ian Bryden (Treasurer)
Simon Dredge
Councillor Janet Grace
Emma Harrison (Designated Representative, The Atkinson)
Lindsey Holding
Stephen Whittle (Designated Representative, The Atkinson)

Executive Summary

This has been a difficult year for charities and The Atkinson Development Trust has been no exception.

We began the year in the early days of the global COVID-19 pandemic. In March 2020 the government told the public to cease social contact and The Atkinson along with arts organisations across the country closed their doors.

We curtailed all of our primary activities for the whole of 2020-2021.

The Wellbeing Choir was unable to meet and whilst we encouraged them to stay connected socially online, virtual choir practice was impractical due to the time delay on Zoom.

Although The Atkinson was able to safely stage a pantomime, seating was socially-distanced, which dramatically reduced capacity. In any case, it would have been unlikely that schools could safely transport groups of schoolchildren to the theatre. This, coupled with the venue's pressing need to make income on the small number of seats available, meant we decided not to offer Free Tickets for Schools.

An important strand of income for us are the donations made by visitors to The Atkinson and online donations when buying tickets for events at The Atkinson. With the premises closed for a significant part of our financial year, income has been considerably smaller than usual.

Grants are normally given for planned activities that are supported by our charity and, with activities curtailed, opportunities to apply successfully for grants have fallen away.

Monthly board meetings have been conducted via Zoom, and this has worked well to keep us all connected, although remote working combined with all the restrictions of the ever-shifting situation has found us feeling less creative and productive.



During the latter part of 2020 two resignations meant we lost a Trustee and an Administrator/Trustee, due to changes in their personal circumstances. This left us somewhat limited in resources but a programme of active recruitment should see our skillset strengthened and Trustee numbers increased by the middle of 2021.

Whilst it has been a frustrating year we have nevertheless made some progress. We changed banks from NatWest to Co-op in order to gain online banking functionality. We developed a Skills Matrix to identify skills gaps and focus our Trustee recruitment.

And we launched a new Membership system to enable people to deepen their relationship with The Atkinson and provide the Trust with another strand of income to underpin our charitable work.

Who we are

The Atkinson Development Trust (TADT) is a small charity run by a committed Board of skilled volunteers and a part-time paid Administrator with a shared love of The Atkinson and Sefton.

We believe in the transformative power of art and that communities thrive best when they have civic pride, a sense of place and a feeling of connection within a community.

The Atkinson Development Trust was established to help The Atkinson use its collections and building to make a positive impact on local people's lives and to tell Sefton's stories.

The Atkinson is the council-owned arts centre in the heart of Southport, which serves the whole borough of Sefton. The Atkinson is home to free-to-access galleries, museum and Southport's main library, plus a main fixed-seating theatre and smaller flexible seating Studio used for ticketed events spanning all types of performing arts, talks and film. Added to this is a social enterprise café, run by Autism Initiatives, a gift shop and Southport's One Stop Shop.



Photo credit: Matt Dodd

What we do

The Trust was set up to work in partnership with The Atkinson. We raise money from individuals, businesses and funding bodies in order to support The Atkinson to use its heritage and art collections to connect with people.

Our main focus is social impact: we have particular interest in supporting projects which benefit the wellbeing of the more vulnerable and under-served people in our community. For example, children in areas of economic deprivation, disabled people and their families, or older people at risk of loneliness and isolation.

More broadly, our work aims to connect people with local stories and improve access to the collections and the building. We support conservation and acquisitions when this enables new stories to be shared with the public, or unlocks new engagement projects.

We work supportively with The Atkinson to expand and enhance their work. We do not work directly with beneficiaries and we do not influence the programming or running of the venue. The Trust operates within Sefton Council, Merseyside. Our work is primarily aimed at, but not limited to, those within the administrative area of Sefton Council.

Our ability to step outside the funding and strategic restrictions associated with the public sector means we are able to apply for different funding and open conversations with potential donors which a Council-run service would struggle to have.

Our aims

- **To connect people with cultural activity and the stories of Sefton**
To encourage the public to participate in and contribute to arts, cultural and heritage activities, managed for Sefton Council with a particular focus on The Atkinson. We want to bring people together, connect them with their community, celebrate the cultural heritage of the area and enable creative expression.
- **To improve access to the collections and the building**
Opening up art, culture and heritage for public benefit, by supporting cultural services managed for Sefton Council, particularly by The Atkinson, and promoting high quality services. This might mean improving physical access through better facilities or supporting the restoration of an artwork to enable it to go on public display.
- **To have a positive impact on local people's lives**
Valuing engagement with cultural activity for the positive impact it can have upon the lives and wellbeing of the public. We have a particular interest in people who are typically under-represented among arts audiences due to a range of social, economic and physical barriers which they may experience.

Statutory declaration: The Trustees have had regard to the Charity Commission's public benefit guidance when exercising any powers or duties to which the guidance is relevant.

Format and function of the Trust

Structure

The Atkinson Development Trust (TADT) is a charitable incorporated organisation which was registered as a charity with the Charity Commission on 23 March 2015.

The Trust is governed by a Board who are Trustees of the charity. After recruitment and vetting, Trustees are appointed by a resolution passed at a properly convened meeting of the Trustees. All Trustees are briefed on their responsibilities as Trustees prior to their acceptance of the role. They have individual and collective responsibility for the management of the charity and its funds.

Governance

Governance of the Trust remained robust during the course of 2020-21. The following Trustees were appointed to the Board:

- Jennifer Cope, (British Museum Trainee), appointed 17 February 2021

The following Trustees resigned due to the increase of outside commitments:

- Simon Dredge resigned 28 July 2020
- Samantha Browne resigned 5 February 2021

TADT supports equal opportunities and we welcome applications from all suitably qualified persons regardless of their race, gender, disability, religion/belief, sexual orientation or age.

Prospective Trustees are targeted according to the skills needed by the Board. Successful applicants are invited to attend Trustees' meetings as an observer. If the Trustees present at the meeting approve the applicant, and the applicant is in agreement, they will be offered a position on the Board. Once elected, new Trustees are made familiar with the activities and policies of TADT. As well as receiving a copy of the Constitution, they are supplied with the previous year's accounts for review along with the Trust's Handbook for Trustees. New Trustees are required to be fully conversant with the responsibilities and obligations in carrying out their role as a Trustee as defined on the Charity Commission website. They are required to sign a Trustee Eligibility Declaration confirming that they are eligible to be a Trustee as defined by the Charity Commission.

The Trustees hold meetings every 4-6 weeks to discuss ideas and make decisions.

Day-to-day running of the Trust is delegated to the Administrator, with strategic steer from The Chair and all financial transactions are overseen by the Treasurer.

Management

It is the Trustees' duty to identify and review the risks to which the charity might be exposed, and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error.

The Trustees actively review the major risks which the charity faces on a regular basis through regular meetings of the Trustees which cover operational and financial reviews.

We don't currently have any volunteers, but we do have one employee - a paid, part-time Administrator. Our Data Manager controls access to all data covered by GDPR and the Administrator has no access to the bank accounts or authority for authorising any payments,

Trustees regularly examine other risks that may become applicable as new situations arise, and develop policies and procedures to mitigate those risks.

Overview of Activities in 2020/21

Charitable Activities

Our two, key charitable activities, The Wellbeing Choir and Free Tickets For Schools, were both hit by the pandemic. The choir was unable to meet in person. Online singing, while considered, was decided not to be viable as the Choir Leader did not have access to the specific production equipment needed to manage virtual participation. Since the original aim of the choir was to bring a sense of community to people who felt isolated, the Trustees held a Zoom get-together with members of The Atkinson's Wellbeing Choir and their Choir Leader in November 2020 to keep them connected. Members also kept in touch via a WhatsApp group which provided social interaction and much-needed mutual support in difficult times. The get-together was warmly welcomed and the group decided after the pilot meeting to continue regular Zoom socials under their own steam.

Whilst The Atkinson was able to put on a Covid-compliant pantomime, seating capacity was significantly reduced, radically limiting what was possible in terms of offering free seats to schools with high pupil premium. The schools themselves were focussed on navigating the challenges of COVID-19 and arranging school trips to the theatre was low on their agenda. Therefore we decided not to forge ahead with this project at this time.

Unspent funds committed to these projects in the accounts will be rolled over to the next financial year. We hope to re-start the Wellbeing Choir in September 2021 and plan to run the Free Tickets for Schools scheme for the winter 2021 pantomime.

Lego Challenge

The idea for this came from Trustee, Lindsey Holding. With limited access for the public to an

exciting Lego exhibition, *Brick Wonders*, which ran in The Atkinson from 27 June - 29 August 2020, online activity was encouraged by inviting people to create their own Lego creations and to share them through social media. There was no prize offered (although there was the potential for inclusion in the exhibition), but there was a good level of participation which produced some interesting and varied creations.

We had allocated funds to underpin some hands-on engagement work on this exhibition which did not take place. This opportunity has now passed so funds will be reabsorbed to be used on a future engagement opportunity.



The Triumph of Art

The Atkinson hosted a virtual exhibition celebrating the restoration of an important painting, given to The Atkinson in the late 19th century. Due to its poor condition, *The Triumph of Art* by Nicolas Pierre Loir had not been exhibited in over a century.



The painting is an homage to Jean Baptiste Colbert, a major patron of the arts and a powerful minister who helped Louis XIV rule over France in the 1600s. The Trust were specifically keen to enable an unflinching exploration of an uncomfortable story which accompanies this painting: Colbert wrote the Code Noir - regulations covering the lives and deaths of slaves in 17th century France.

We invited Dr Onyeka Nubia to comment on the painting and the patron. Dr Nubia is a pioneering and internationally recognised historian, writer and presenter who is reinventing perceptions of the Renaissance, British history, Black Studies and intersectionalism.

As part of a programme of virtual events during lockdown, Dr Onyeka Nubia gave a talk on '*The Triumph of Art*', Colbert and the Code Noir, delivered online on 15 October 2020. It remains available to watch on The Atkinson's website here:

<https://www.theatkinson.co.uk/events/colbert-code-noire/>

Winged Heart Scarab Conservation

The Trust agreed to gift £280 to The Atkinson to enable the conservation of a magnificent and rare Egyptian Winged Heart Scarab (1069 - 525 BC) from The Atkinson's collection. It was also agreed that the Trust would fund the video recording of the restoration for later publication.

The purpose of this is to produce a short and engaging film to show the conservation process. This aims to tap into the current awareness and interest in restoration - thanks to the mainstream appeal of BBC's *The Repair Shop* - to leverage public donations for future conservation work by showing people the immediate impact and long term legacy their donation could have.



The funds have been committed in the accounts and will be paid to The Atkinson in the next financial year.

Jin Jin Ji Acquisition

The Trust agreed to part-fund (£2,925) the purchase of *Jin Jin Ji*, a painting by Gordon Cheung. The painting will join The Atkinson's collection in 2021/22.

The Atkinson have acknowledged that artists from Black and minority ethnic backgrounds are underrepresented amongst their collections, and we were keen to support their acquisition policy which aims towards a rebalancing of the collections.



The amount is committed in the accounts and will be paid to The Atkinson in the next financial year.

Re-launch of Membership Scheme

The Trust's membership scheme was relaunched on 14 February 2021 with a stronger package which is designed to be more attractive to potential Members and more easily managed by the team.

Much of the system has been automated, Membership is much more affordable for people with low or no income, and provides more benefits. It can be bought and renewed online, and bought as a gift. New messaging has been developed to promote it, and assets produced for the membership pack.

Given the challenges of lockdown - the venue closed much of the time, and no hard-copy marketing materials available when they were open - this was a soft launch, but we are delighted to say that there has been a modest but promising start. There is a provision in the accounts to permit later promotion of the scheme.

Fundraising Activities

The pandemic severely restricted the Trust's ability to raise funds. However, during the relatively short period that The Atkinson was able to admit the public to museums and galleries collecting boxes were relocated to best give opportunities to donate in the one way systems around the building. The Atkinson website was also amended to give more opportunities to donate to the Trust.



Unrestricted funds

Donation boxes, fundraising events and online giving raised £240.00. Revenue from the Trust's membership scheme will largely fall into financial year 2021/22 due to the February 2021 relaunch.

Restricted Funds

We received £100 from The Rushworth Trust directly supporting the Wellbeing Choir and this has been added to the budget for the Choir.

Gift Aid

We registered for Gift Aid and were able to claim back to when the Charity started in 2015. £2592.50 was received for the period 2015 to 2018.

Awareness-raising

External Awareness-raising and Promotion

As a result of the pandemic, with venues closed, print removed from racks, newspapers not being published for much of the time, and comparatively little Trust activity to promote, we have had limited opportunity to raise awareness and promote our work.

Much work has been done to raise our profile within The Atkinson website and we are pleased



with the results, but have to accept that this channel of communication is speaking to an audience who are, by and large, already supportive.

Internal Awareness-raising and Advocacy

Members of the Board, particularly the Chair, Administrator and Treasurer have liaised remotely with the team at The Atkinson upon the improvement of the website and the implementation of systems in support of the new membership scheme. The two Board members from The Atkinson, Stephen Whittle and Emma Harrison have been able to promote the plans and ambitions of the Trust while, at the same time, have been soliciting ideas and views from The Atkinson's teams. We are hopeful that this contact will have, at least, maintained levels of awareness and advocacy within The Atkinson.

Financial Review

Bank

During the year we switched our bank accounts from NatWest to Co-op. Natwest are very inflexible and could offer us no online facility for viewing transactions and making payments.

The Co-op Bank caters for all of our needs, permitting online banking. Online payments require two authorisers; the originator (Treasurer) and another Trustee, currently either the Chair or Stephen Whittle.

The total incoming resources for the year amounted to £2,841.06.

The total expenditure in the year amounted to £4,834.36.

Cash funds last year end: £40,640.78.

Cash funds this year end: £38,647.48.

Reserves policy

In 2016, the Trustees agreed a policy of holding reserves of unrestricted funds of a minimum of £10,000. The Trust holds reserves in order that it can continue to achieve its objectives should there be a reduction in incoming resources, such as experienced during the pandemic. However, careful management has meant that we haven't had to use any of the reserve.

Reserves in this context mean funds that are freely available for the Trust's general purposes after all commitments have been met.

As at 31 March 2021 the Trust had remaining unrestricted funds (after reserves) of £5963.27.


At year end The Trust feels that we have managed our residual funds effectively during the Pandemic crisis. We are pleased to confirm that we have provisions in place to cover previously planned activities and have a reserve of £10,000. The remaining £5,963.27 is not a large sum but is considered to be more than sufficient to cover administrative activities until such time as

donations and active fundraising are able to recommence.

Declaration


The Trustees declare that they approve the Trustees' report above.

Signed on behalf of The Atkinson Development Trust's Trustees:

Signature:.....

Name: Jo Kay, Chair of The Atkinson Development Trust

Date: 15 July 2021

THE ATKINSON DEVELOPMENT TRUST	As at:	31/08/2021	
Income & Expenditure Account			
	Unrestricted	Restricted	Total
INCOME			
Individual Giving	0.00	0.00	0.00
Membership	0.00	0.00	0.00
Donations - Restricted	0.00	100.00	100.00
Donations - Unrestricted	140.00	0.00	140.00
Grants - Restricted	0.00	0.00	0.00
Grants - Unrestricted	0.00	0.00	0.00
Gift Aid	2,592.50	0.00	2,592.50
Miscellaneous	0.00	0.00	0.00
Interest	8.56	0.00	8.56
Total Receipts	2,741.06	100.00	2,841.06
EXPENDITURE			
Projects - Restricted	0.00	500.00	500.00
Projects - Unrestricted	3,578.27	0.00	3,578.27
Administration Costs	726.70	0.00	726.70
Membership Scheme Costs	29.39	0.00	29.39
Marketing	0.00	0.00	0.00
Charity Donation	0.00	0.00	0.00
Miscellaneous	0.00	0.00	0.00
Total Payments	4,334.36	500.00	4,834.36
Surplus/(Deficit) of Receipts over Payments	(1,593.30)	(400.00)	(1,993.30)
Cash Funds Last Year End	28,170.08	12,470.70	40,640.78
Surplus/(Deficit) for the Year	(1,593.30)	(400.00)	(1,993.30)
Cash Funds This Year End	26,576.78	12,070.70	38,647.48
Outstanding Commitments			
Vanwall Sponsorship	1,100.00	0.00	1,100.00
Bridging the Gap	0.00	9,961.00	9,961.00
Restoration Project	0.00	709.70	709.70
Bessie Downs Exhibition	0.00	1,000.00	1,000.00
Speakers	0.00	300.00	300.00
Scarab Belt Restoration	500.00	0.00	500.00
Choir 2021	3,200.00	100.00	3,300.00
Free Tickets 2020	4,233.50	0.00	4,233.50
Marketing	1,517.97	0.00	1,517.97
Subscription to Matterport 2021	62.04	0.00	62.04
Minimum funds to remain in Trust Accounts	10,000.00	0.00	10,000.00
Total Commitments	20,613.51	12,070.70	32,684.21
Funds remaining after commitments	5,963.27	0.00	5,963.27
STATEMENT OF ASSETS AND LIABILITIES			
Cash Funds This Year End			38,647.48
Accruals			
Monetary Assets:			
Coop Current Account			5646.95
Coop Deposit Account			33000.53
			38,647.48
Signed			
Jo Kay, Chair			
Date	16th July 2021		

Independent Examiner's Report to the trustees of The Atkinson Development Trust For the year ended 31st March 2021

I report on the accounts of The Atkinson Development Trust ('the charity') for the year ended 31st March 2021.

Responsibilities and basis of report

As the charity trustees of the charity 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 charity'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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. the accounts do not accord with those records.

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.



Anthony Deegan MAAT, MICB Pm. Dip.
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