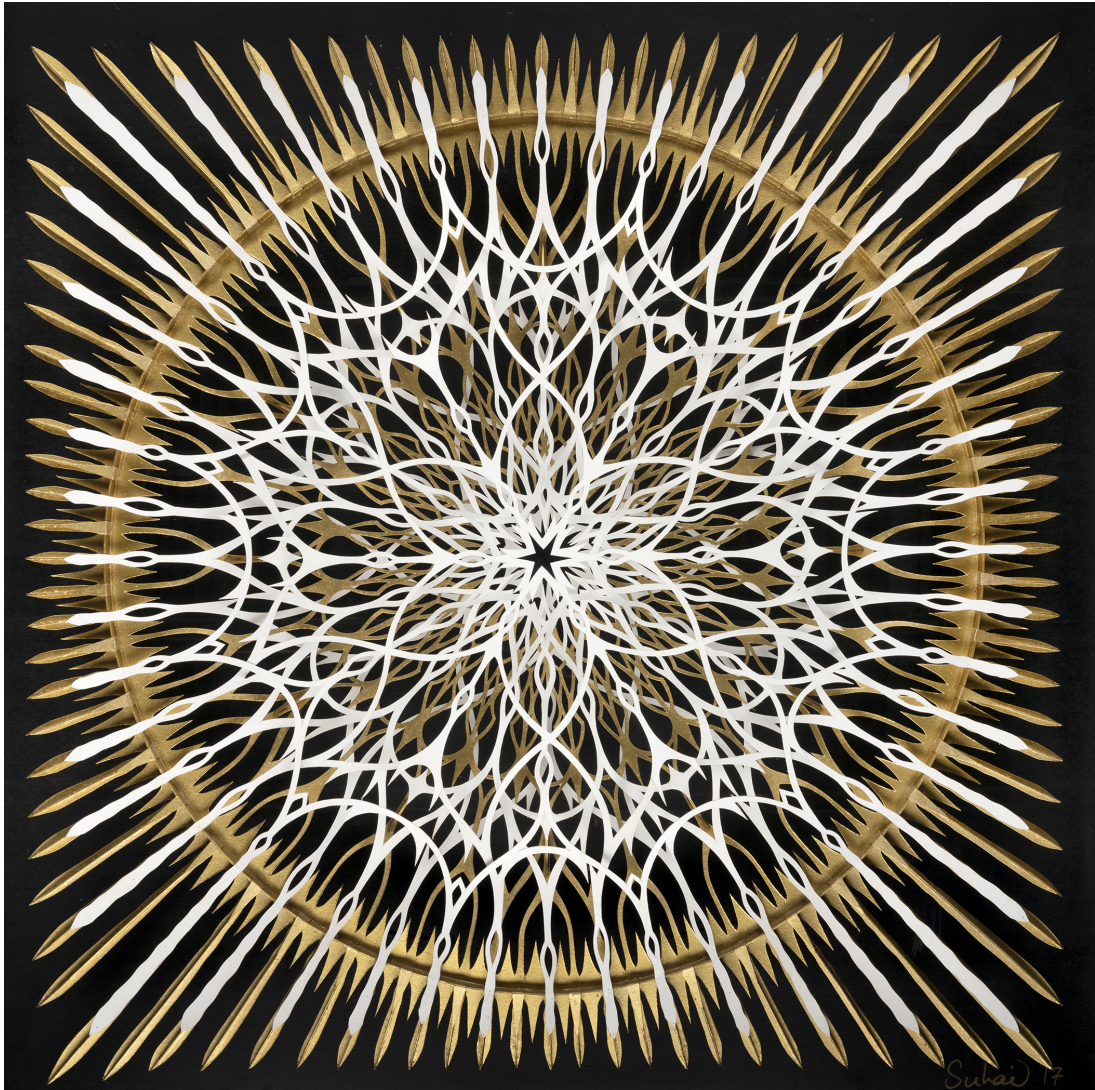


THE ATKINSON DEVELOPMENT TRUST

IMPROVING LOCAL PEOPLE'S LIVES THROUGH ART AND
HERITAGE



'Mandala', a three-dimensional paper sculpture by Suhail Shaikh. Acquired for the permanent collection at The Atkinson with support from The Atkinson Development Trust.

TRUSTEES' ANNUAL REPORT 2024-2025

THE ATKINSON DEVELOPMENT TRUST

TRUSTEES' ANNUAL REPORT

FOR THE PERIOD 1 APRIL 2024 TO 31 MARCH 2025

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:

Alice Clark (Chair)

Robert Schooler (Treasurer)

Luke Barnes

Laura Bell

Jill Carruthers

Gemma Grady-Hill

Bernadette Reynolds

Matthew Smith

THE ATKINSON DEVELOPMENT TRUST – ANNUAL REPORT

Contents

Executive Summary 4

Overview of Activities in 2024/25 8

Financial Review 13

Declaration 14

EXECUTIVE SUMMARY

2024/25 has been a challenging and reflective year for the Trust, shaped by both external events and significant organisational change. In July 2024, Southport experienced a tragic and deeply distressing event that profoundly affected the whole town. In the weeks and months that followed, there was a necessary period of collective pause and recovery, during which the focus of charities, cultural organisations and community groups shifted towards support, respect and healing. The Atkinson became a central place for remembrance and community gathering, with tributes laid outside by the fountains and people coming together to support one another. The emotional impact on local residents, many of whom are integral to both the Trust and The Atkinson, and the longer-term recovery for the town remains significant.

Against this backdrop, planned and scheduled activity across the year was inevitably affected. While the Trust's governance structure remained unchanged, there was major transition within The Atkinson team. Stephen Whittle retired in February 2025 after many years of dedicated service, with David Tetlow taking up the role in summer 2025. This period of change, combined with wider pressures across the town, reduced organisational capacity and meant that fewer additional projects were delivered than would normally be hoped for. Nevertheless, core activities continued, including regular meetings, strategic planning and forward thinking.

Despite the challenges, several key activities continued to deliver positive outcomes. The Ukulele Project expanded into Formby, an area with evidence of social isolation and loneliness among older adults. The Trust also supported activity around the Sefton Open exhibition and provided inclusion tickets for the Christmas pantomime, enabling people who would not normally attend theatre to access and enjoy live performance.

ABOUT THE TRUST

The Atkinson Development Trust (TADT) is a small charity run by a committed Board of skilled volunteers 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 and heritage 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 a council-owned arts centre in the heart of Southport, which serves the whole borough of Sefton. The Atkinson houses free-to-access galleries, a 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 there is a gift shop as well as a social enterprise café which is run by Autism Initiatives.

WHAT WE DO AND OUR AIMS

The Atkinson Development Trust exists to support The Atkinson in using art, heritage and culture to make a positive difference to people's lives across Sefton.

Working in partnership with The Atkinson, the Trust raises funds from individuals, businesses and other supporters to enhance access to collections, exhibitions, performances and learning opportunities. The Trust does not deliver programmes directly or influence artistic programming; instead, it supports projects that align with its charitable objectives and enable The Atkinson to reach and engage wider and more diverse audiences.

We aim to:

To connect people with local stories and cultural activity: The Trust supports initiatives that encourage people to participate in, contribute to and engage with arts, culture and heritage. By helping to share local stories alongside national and international perspectives, the Trust aims to foster civic pride, a sense of place and meaningful connection within the community.

To improve access to and engagement with The Atkinson's collections and building: The Trust works to remove barriers, physical, social or economic, that prevent people from accessing culture. This may include supporting conservation, acquisitions, digitisation or interpretation projects that unlock new ways for audiences to experience collections and the building.

To have a positive impact on local people's lives: Social impact is central to the Trust's work. Particular priority is given to projects that support the wellbeing of people who are under-represented in arts and cultural activity, including children in areas of economic deprivation, disabled people and their families, and older people at risk of loneliness and isolation.

The Trust operates within the geographic area of Sefton Metropolitan Borough Council, with its work primarily focused on benefiting local communities while welcoming wider audiences. By complementing The Atkinson's public-sector role, the Trust is able to seek alternative funding opportunities and maximise public donations, including through the effective use of Gift Aid.

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

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. 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. Within those guidelines, prospective Trustees are targeted according to the skills needed by the Board. After recruitment and vetting, Trustee applicants are invited to attend a meeting as a guest,

after which they are formally invited to become a Trustee. All Trustees are briefed on their responsibilities as Trustees prior to their acceptance of the role and guidance documents are issued as part of an induction process. They have individual and collective responsibility for the management of the charity and its funds.

BOARD RECRUITMENT AND ORGANISATIONAL DEVELOPMENT

2024/25 has been a year of significant change for the Trust's Board, marked by both transition and reflection.

In October 2024, Treasurer Ian Bryden stepped down after many years of dedicated service to the Board. Ian's contribution to the financial stewardship and stability of the Trust has been substantial, and his departure represents a loss of experience and knowledge. The Board extends its sincere thanks to Ian for his commitment and support over many years. Robert Schooler was appointed as Treasurer, and the Board is grateful for his willingness to take on this important role.

During the year, Trustee Dom Potter also stepped down due to other commitments, and in February 2025 Lindsey Holding left the Trust due to family circumstances. Lindsey's involvement with the Trust spanned several roles, including Trustee, Interim Chair, and Administrator, and she gave a great deal of time, energy and care to the organisation during periods of change and transition. The Board records its heartfelt thanks to Lindsey for her significant contribution and service.

As a result of these departures, the Board has begun recruitment for additional Trustees to strengthen capacity, broaden skills and ensure resilience moving forward.

In terms of organisational development, the Trust has reviewed its internal administration and ways of working. During the year, the Board made a conscious decision to move away from Trello, recognising that while it is an effective project management tool, it was not best suited to streamlining overall administration. The focus has shifted towards simplifying processes in order to allow Trustees to spend more time on strategic thinking and maximising community impact.

The Trust has not replaced the paid Administrator role at this time. The Board considers this to be a values-led decision, reflecting a commitment to ensuring that income from donors and memberships is directed primarily towards supporting community benefit and programming rather than Trust salaries. When capacity allows, the Board intends to recruit a volunteer administrator to support essential functions.

Overall, the year has involved difficult but necessary decisions, alongside a renewed focus on accountability and impact, positioning the Trust for future growth and sustainability.

GOVERNANCE

During 2024/25, the following Trustees stepped down:

- Ian Bryden (Trustee and Treasurer) ceased: October 2024
- Lindsey Holding (Trustee and Administrator) ceased: February 2025
- Dominic Potter (Trustee) ceased: November 2024

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 Chair in the current absences of an Administrator, and all financial transactions are overseen by the Treasurer.

MANAGEMENT

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

The Trust does not currently employ any paid staff. Administrative functions are undertaken by Trustees, with responsibilities clearly defined to maintain appropriate separation of duties. No individual involved in administration has sole authority over financial transactions.

The Treasurer oversees financial management and reporting, with authorisation of payments subject to agreed controls and Trustee oversight. The current Treasurer, who is also an established volunteer at The Atkinson, brings both financial expertise and an in-depth understanding of the organisation, strengthening governance and continuity.

Responsibility for data protection and GDPR compliance sits with the designated Data Manager, who controls access to all data held by the Trust and ensures that appropriate policies and safeguards are in place.

OVERVIEW OF ACTIVITIES 2024/25

The Trust's accounts are prepared on a cash-basis. As a result, there can be timing differences between when projects are delivered and when related expenditure is recorded, particularly where invoices are received after the end of the financial year.

All income received during 2024/25 arose from memberships, donations and sponsorship, and no restricted funds were held during the year. Trustees approve support for specific projects in line with the Trust's charitable aims, and expenditure may fall in a different financial year to project delivery where invoices are delayed.

PROJECTS DELIVERED IN 2023/24, AND FUNDED IN 2024/25

Due to the Trust's cash-basis accounting, some expenditure recorded during 2024/25 relates to projects that were delivered or substantially developed in earlier financial years.

Kevin Laycock Exhibition Support (£1,000)

The Trust supported the exhibition *Quilt | Grid | Pattern*. While the activity took place in 2023/24, expenditure fell within 2024/25.

Suhail Shaikh Exhibition Support (£4,300)

The Trust supported activities around Suhail Shaikh's *Paper My Wishes* exhibition, delivered in 2023/24, with final costs settled during 2024/25.

Strategic Development Work (£1,700)

The Trust supported The Atkinson in commissioning an independent consultant to develop a Case for Support for a proposed immersive, interactive space for young people. The work brought together consultation findings, demographic evidence and sector research to assess the potential need, impact and feasibility of such a space.

The report highlighted significant unmet need among young people across Sefton, particularly in areas of high deprivation, and identified strong interest in immersive and interactive approaches to engaging with art, heritage and contemporary issues such as mental health and climate change. It also set out a detailed vision for how an immersive space could support skills development, wellbeing and long-term engagement with culture, aligned with The Atkinson's Youth Engagement Strategy.

Following changes in senior staffing and in light of programme priorities for 2026, the development of an immersive experience is not currently being progressed. However, the consultancy work has provided a valuable evidence base and strategic resource that can inform future planning. The Trustees recognise that whether an immersive experience is required or appropriate will need to be explored further by The Atkinson as part of longer-term programme and capacity considerations.

PROJECTS DELIVERED AND FUNDED IN 2024/25

Philip Connard Exhibition Catalogue (£1,000)

The Trust initially provided £3,000 to support the production of the exhibition catalogue accompanying *Eternal Summer: Paintings by Philip Connard*. The exhibition in Summer 2024 brought together works by the Southport-born artist from national collections and was accompanied by a new publication authored by Stephen Whittle. During 2024/25, The Atkinson confirmed that the full amount was not required. With Trustee approval, £2,000 of the original allocation was reallocated to support the acquisition of photographic works by Eon Flanders, with all decisions and expenditure taking place during the year. This approach ensured that funds continued to be used effectively in support of collections development and public benefit.

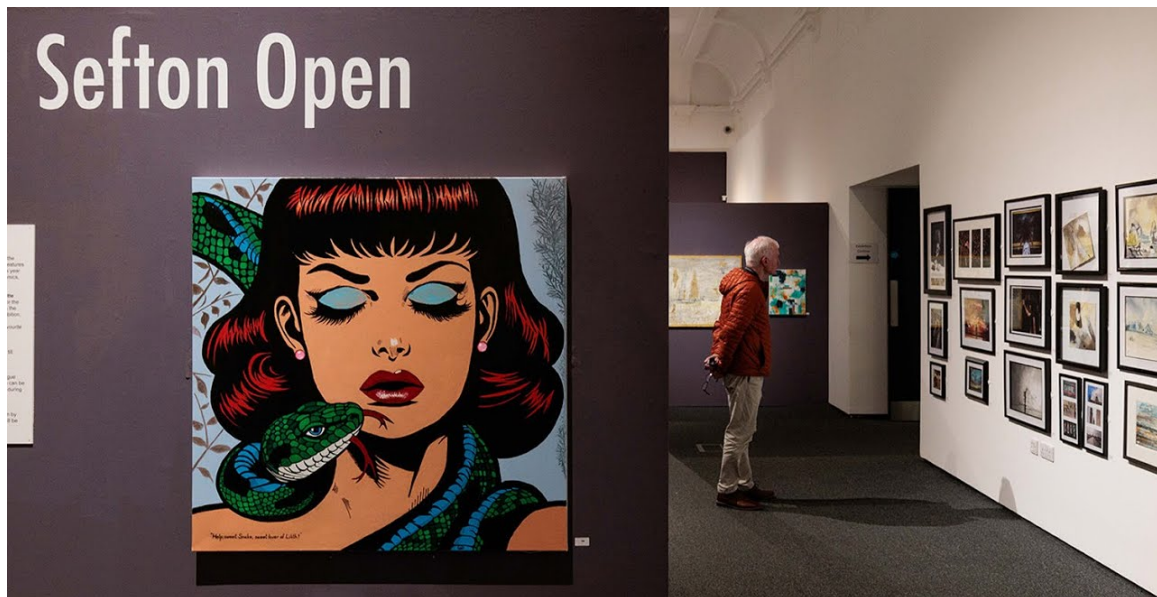
Ukulele Lending Library and Community Music (£1,310)

Building on the successful launch of Southport's Ukulele Lending Library, the Trust gave £1,310 to support the continuation and expansion of the project during 2024/25. The scheme enables adults to borrow ukuleles free of charge via local libraries, reducing financial barriers to music-making and encouraging social connection. During the year, the project expanded beyond Southport into Formby, an area with evidence of social isolation and loneliness among older adults.



Sefton Open Exhibition – Associated Activity (£1,200)

The Trust supported activity linked to the Sefton Open exhibition, helping to enhance opportunities for local people to engage with contemporary visual art. The Sefton Open provides an important platform for artists across the borough and supports public engagement with creative practice.



PROJECTS DELIVERED IN 2024/25, AND AWAITING INVOICE

Social Inclusion Tickets - Christmas Pantomime 2024 (£1,896)

During 2024/25, the Trust supported Social Inclusion Tickets for the Christmas pantomime *Cinderella*, enabling individuals and families who would not otherwise be able to attend to experience live theatre. Tickets were allocated through referral routes, ensuring that access was targeted and meaningful. The invoice for this has yet to be received.

Suhail Shaikh Acquisition – Trust Contribution (£1,200)

During the 2024/25 financial year, the Trust agreed to support the acquisition of *Mandala*, a three-dimensional paper sculpture by Suhail Shaikh, for The Atkinson's permanent collection. The acquisition was secured through a partnership funding approach, with additional support from Arts Council England / V&A Purchase Grant Fund and The Arts Society Southport. The acquisition represents an important investment in contemporary craft and visual art, ensuring that a significant work from a well-received exhibition remains accessible to the public in Southport. The sculpture is now on display on the museum landing along with information and a thank you to the Trust alongside a donation box. Staff and volunteers are using it as a way to show people what their donations go towards and hopefully encourage more. While the project was agreed and actioned during 2024/25, the invoice was received after the year end. In line with the Trust's cash-basis accounting, the related expenditure will be recorded in the 2025/26 accounts.

Eon Flanders Photographic Portraits

During 2024/25, the Trust supported the acquisition of photographic portrait works by Eon Flanders. The portraits were used as part of The Atkinson's Windrush exhibition, contributing to the telling of contemporary stories connected to identity, heritage and lived experience. The works have ongoing relevance beyond the initial exhibition. The Atkinson team is

currently in discussion with SACHA regarding the potential resurrection and touring of the Windrush exhibition, which would enable the photographs to reach wider audiences and extend their impact. The acquisition supports the Trust's commitment to collections development that enables new narratives to be shared and increases opportunities for public engagement.

ONGOING PROJECTS

Matterport – Digital Exhibition Archive (£289)

The Trust continues to fund a subscription to Matterport, a digital platform originally adopted during the Covid-19 pandemic to provide virtual access to exhibitions for people unable to visit in person. During the pandemic, Matterport enabled exhibitions at The Atkinson to be explored online, including through immersive 360-degree views and virtual reality, supporting access for vulnerable and isolating audiences. The platform now functions primarily as a digital archive of exhibitions. Most exhibitions since 2020, with the exception of the Sefton Open, have been recorded in this format. The archive has proved useful for professional purposes, allowing curatorial staff to review exhibition layouts and share installation approaches with other venues. Trustees are currently reviewing the ongoing value and utilisation of this subscription to ensure it represents appropriate use of charitable funds.

Adopt a Teddy (£475 income)

During 2024/25, the Trust received **£475** through the Adopt a Teddy scheme. The scheme invites members of the public to symbolically 'adopt' one of the historic teddy bears from The Atkinson's museum collection, helping to raise funds while increasing awareness of the collection and its care. The initiative provides a light-touch, family-friendly way for visitors to engage with the museum's heritage, while generating unrestricted income to support the Trust's wider charitable activities.

DIGITAL TOOLS AND SUBSCRIPTIONS REVIEW

During the year, the Trustees undertook a review of the Trust's digital tools and paid subscriptions to ensure they continued to represent good value for money and supported efficient governance.

As part of this review, the Board agreed to end the Trust's use of Trello, which had previously been used as a project management and information-sharing platform. While Trello was valuable during a period of higher project volume and remote working, its use has reduced as the Trust has streamlined administration and simplified ways of working. The subscription will therefore cease in June 2025.

The Trustees are also reviewing the ongoing use of paid services including Zoom and paid email platforms, recognising that current usage levels may not represent best value for money. Alternative, lower-cost or free solutions are being considered where appropriate.

These decisions reflect the Trustees' commitment to regularly reviewing operational costs and ensuring that charitable funds are directed primarily towards delivering public benefit.

LOOKING AHEAD

The Trustees recognise the challenges posed by delayed invoicing and are working closely with The Atkinson team to improve timelines and ensure clearer alignment between project delivery and financial reporting in future years.

FINANCIAL REVIEW

INCOME

During 2024/25, the Trust's income continued to be generated primarily through memberships and general donations, reflecting strong ongoing support for **The Atkinson** and the Trust's work.

Total income for the year included **£5,695.15** from memberships, **£8,278.26** from general donations received via The Atkinson's ticketing system, and **£1,000** from seat sponsorship. In addition, this was the first full year in which the Trust was able to claim Gift Aid on eligible donations, generating an additional **£1,320.14** in income. The Trust also received £475 through the Adopt a Teddy scheme.

The Trust does not routinely fundraise for specific projects and does not run restricted appeals. This approach ensures that income remains unrestricted and can be allocated flexibly by Trustees to support projects that best align with the Trust's charitable objectives and respond to emerging need.

Expenditure during the year includes payments relating to projects approved and reported in previous financial years, where final costs were settled during 2024/25 in line with the Trust's cash-basis accounting.

During the year, the Board also provided financial support for The Atkinson to engage a freelance fundraiser. This investment was made to explore opportunities to broaden income streams, develop donor relationships and strengthen future fundraising capacity, recognising the increasing financial pressures facing publicly funded cultural organisations.

AWARENESS-RAISING ACTIVITIES

Membership and awareness of the Trust were promoted through The Atkinson's digital marketing channels, including social media, e-newsletters, the website and in-house digital screens. When print activity could be reintroduced, A5 leaflets were produced and placed at key visitor points throughout the building.

An information board was installed on the ground floor of The Atkinson, positioned between the café and the library. This provides a permanent, visible space to explain the Trust's purpose, highlight supported projects and encourage visitors to become members or make donations. The board is intended to improve transparency and understanding of how public support contributes to cultural and community impact.

SITUATION AT YEAR END

The total incoming resources for the year amounted to **£16,815.27**.

The total expenditure in the year amounted to **£15,033.99**.

Cash funds at last year end: **£39,692.58**.

Cash funds at this year end: **£41,473.86**.

RESERVES POLICY

The Trust holds reserves to ensure it can continue to achieve its charitable objectives in the event of a reduction in income, such as that experienced during the Covid-19 pandemic. Careful financial management has meant that the Trust has not needed to draw on its reserves during the year. For the purposes of this policy, reserves are defined as funds that are freely available for the Trust's general purposes once all known commitments have been met.

In 2016, the Trustees agreed a policy of holding minimum unrestricted reserves of £10,000.

At the end of the 2023/24 financial year, the Trust held total cash funds of £39,692.58, including £3,000 previously reported as restricted under earlier accounting treatment in relation to a specific project.

During 2024/25, the Trust generated a net surplus of £1,781.28, resulting in total cash funds of £41,473.86 as at 31 March 2025. All funds held at year end are unrestricted.

Of the unrestricted funds held at year end, £10,000 is designated as reserves in line with the Trust's reserves policy. The remaining £31,473.86 is available to support future charitable activity, including projects planned for delivery in 2025/26.

The Trustees remain in ongoing discussion with The Atkinson team to identify appropriate projects and initiatives through which these funds can be applied to deliver maximum public benefit in line with the Trust's charitable objectives.

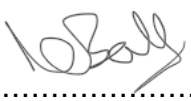
VAT VALIDATION

In line with our responsibilities as a charitable body, all payees have been checked to confirm that, where applicable, they are properly registered for VAT.

DECLARATION

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

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

Signature: 

Name: Alice Clark, Chair of The Atkinson Development Trust

Date: 22 January 2026

THE ATKINSON DEVELOPMENT TRUST

As at: 31/03/2025

Income & Expenditure Account
INCOME

	Unrestricted	Restricted	Total
Individual Giving	0.00	0.00	0.00
Membership	5,695.15	0.00	5,695.15
Corporate Membership	0.00	0.00	0.00
Sponsorship	0.00	0.00	0.00
Donations - Restricted	0.00	0.00	0.00
Donations - Unrestricted	8,278.26	0.00	8,278.26
Grants - Restricted	0.00	0.00	0.00
Grants - Unrestricted	0.00	0.00	0.00
Seat Sponsorship	1,000.00	0.00	1,000.00
Gift Aid	1,320.14	0.00	1,320.14
Miscellaneous	1.01	0.00	1.01
Interest	520.71	0.00	520.71

0

Total Receipts **16,815.27** **0.00** **16,815.27**
EXPENDITURE

Projects - Restricted	0.00	3,000.00	3,000.00
Projects - Unrestricted	9,925.28	0.00	9,925.28
Administration Costs	1,971.21	0.00	1,971.21
Contactless Donation Fees	180.00	0.00	180.00
Seat Sponsorship	0.00	0.00	0.00
Membership Scheme Costs	(42.50)	0.00	(42.50)
Marketing	0.00	0.00	0.00
Charity Donation	0.00	0.00	0.00
Miscellaneous	0.00	0.00	0.00

Total Payments **12,033.99** **3,000.00** **15,033.99**
Surplus/(Deficit) of Receipts over Payments **4,781.28** **(3,000.00)** **1,781.28**

Cash Funds Last Year End	36,692.58	3,000.00	39,692.58
Surplus/(Deficit) for the Year	4,781.28	(3,000.00)	1,781.28
Cash Funds This Year End	41,473.86	0.00	41,473.86

STATEMENT OF ASSETS AND LIABILITIES

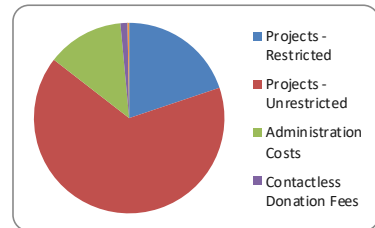
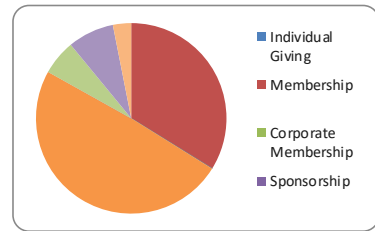
 Cash Funds This Year End **41,473.86**

Signed

Alice Clark, Chair

Date

1st August 2025

Independent Examiner's Report to the trustees of The Atkinson Development Trust For the year ended 31st March 2025

I report on the accounts of The Atkinson Development Trust ('the charity') for the year ended 31st March 2025.

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.

Ian Wright

14th August 2025

Ian Wright FCA
Community Accountant
Sefton Council for Voluntary Service
Burlington House
3rd Floor, Suite 3b
Crosby Road North
Waterloo
Liverpool
L22 0LG