



**ANNUAL REPORT
FOR EPWORTH OLD RECTORY
(OPERATIONS)
CIO REGISTRATION 1165387

FOR THE YEAR ENDED
31st DECEMBER 2024**

Issue 1	Document with Independent Examination complete	2 April 2025

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INTRODUCTION AND BACKGROUND

1a Background details to the 2024 Report

- Epworth Old Rectory (Operations), EOR (Ops), is registered with the Charities commission as a Charitable Incorporated Organisation (CIO) in England and Wales. Its Charity Registration Number is 1165387.
- It operates in partnership with Epworth Old Rectory (Trust) which is registered with and overseen by the Methodist Church in Great Britain (MCIGB).
- The relationship between EOR (Ops) and EOR (Trust) is set out in a Partnership agreement which is documented as EOR016

1b Historical Information

- Epworth Old Rectory (EOR) was, from 1695 to 1745, the family home of Samuel and Susanna Wesley and their 19 children (of whom 10 survived) including John and Charles Wesley, founders of Methodism. In 1709 the existing rectory was burned to the ground and the current building erected in its place.
- The Old Rectory is a Queen Anne Grade I Listed Building. It had a number of extensions during the early 19th century. Some outbuildings were added in the late 19th and 20th centuries. The property still retains over 4 acres of glebe land - referred to by the Wesleys as 'the croft' - in addition to formal gardens.
- The building continued to be used by the Church of England as a rectory for St. Andrew's parish until 1954 when it was bought by funds raised by the World Methodist Council (WMC) and registered by the Trustees for Methodist Church Purposes (TMCP).
- In 1957 it was opened to the general public as a museum dedicated to the life and times of John and Charles Wesley, and in particular, to the influence on them by their parents Samuel and Susanna Wesley.
- A collection of historical objects and "Wesleyana" has grown over the years, with a library of books and documents connected to the Wesleys being donated to the museum in the 1980s.
- In 2015 an agreement was reached to house the archives of successive Methodist women's movements and to mount exhibitions featuring their work.
- In 2023 the Valuation Office (HMRC) changed the designation of the property from a Museum to a historic building. This reduced the rateable value by a significant amount.
- Epworth Old Rectory opens for seven months of the year and receives visitors from all over the world.

1c Legal status

- Epworth Old Rectory is owned by the WMC.
- The Title Deeds are held by the TMCP on behalf of the WMC;
 - TMCP are therefore the custodian Trustees;
 - WMC and MCIGB are represented on EOR (Trust), a Board of Trustees which is appointed by the Conference of MCIGB. This Trust manages the property and oversees the charitable activity which together are described as Epworth Old Rectory (EOR).
- EOR (Ops) is responsible for the day to day activities. It is supported and overseen by EOR (Trust)
- The constitutions of EOR (Trust) and EOR (Ops) are documented as EOR006 and EOR017 respectively.
- The formal agreement which sets out the relationship between EOR(Trust) and EOR (Ops) is documented as EOR016
- Epworth Old Rectory is registered by the Valuation Office as a historic building.

2. ADMINISTRATIVE DETAILS

2a Charity details

Charity name Epworth Old Rectory (Operations)

Registered charity number 1165387 (Registered 2/2/2016)

Charity's principal address
1 Rectory Street
Epworth
North Lincolnshire
DN9 1HX

website www.epwortholdrectory.org.uk

Independent Examiner:
Glover and Co
High Street
Epworth
North Lincolnshire
DN9 1ET

Principal Bankers:
HSBC Bank plc
31 Carolgate
Retford
Nottinghamshire

Contact Person
Mr John Purdy (Secretary)
Marina House
Hatfield Road
Thorne
Doncaster DN8 5RA

2b Directors who have held office during 2024

CHAIR Mrs Sarah Friswell

VICE-CHAIR

SECRETARY:

TREASURER:

Mr John Purdy

Revd Stuart Gunson

Mr Barry Clarke

Mrs Kate Close

Mrs Angela Creswick

Revd Vicki Atkinson

Mr John Lambert

Mr Owen Roberts

Mrs Rosanna Whittaker

Non-voting 'others' Strategic Manager

Dr Jane Hubbard (Resigned April 24)/Mrs Sarah Maltby

Methodist Heritage Officer

Ms Olivia Threlkeld

Methodist Director of engagement

Ms Jo Hibbard

Representative of Methodist Women Britain

Mrs Bronwen Braisdell

Museum Development Officer (Museum

Ms Elizabeth Denton

Development North)

3. STRUCTURE, GOVERNANCE AND MANAGEMENT

3a Date and nature of the governing document

Epworth Old Rectory (Operations) is registered as a CIO under the Charities Act 2006. The Charity Registration Number is 1165387.

Governance of EOR (Ops) is the responsibility of the Directors.

- The Directors consist of a Chair, Secretary, Treasurer, and up to a maximum of 12 in total.
- At least 8 are appointed by EOR(Trust)
- Included in the above 8 there will be one ex-officio Trustee.
- The appointed directors will themselves appoint up to the max of 12 to reflect the required balance of knowledge and skills required.

In addition four people attend the Directors Meetings in a non-voting capacity.

- The Strategic Manager, who is employed by the Trustees, is responsible for the day to day running of EOR and for overseeing the development work.
- A Museum Development Officer
- The Methodist Heritage Officer.
- The Methodist Director of Engagement

The Directors operate the site through the regular meetings of the Directors

Additional governance issues

In 2019 the Business plan was reviewed, and a 5 year Forward Plan was prepared. This is included in our portfolio of documents as EOR 031. All the policies referred to in the business plan are available for inspection. Epworth Old Rectory is an Accredited Museum.

3b Recruitment, nominations and appointment of new Trustees

The appointment of new Directors will be made in accordance with the Constitution document.

It is noted that

- Mrs Rosanna Whittaker was appointed as a Director during 2024
- Mr Barry Clarke resigned as a Director during 2024

3c Management Issues

Epworth Old Rectory employs a part time Strategic Manager (SM) for 16 hours per week, a Visitor and Collections Manager (VCM) for 25 hours per week, an Outreach, Learning and Engagement Manager (OLEM) for 22.5 hours per week and 3 part-time staff at a total of 27 hours per week.

4 FINANCIAL REVIEW

4a Annual accounts

The Annual accounts for 2024 are included in this report.

These accounts show that expenditure exceeded income by £33273 (see note in 4b)

An analysis of the funds that are held is shown with the account. These funds are referred to below in the statement of policy on reserves.

The Directors offer their thanks to:

- Staff and volunteers who work so hard to make the Old Rectory such a pleasure to visit.
- Friends and donors who give to help the work of the Old Rectory.
- The various organisations that have made grants for special projects and the general running of the Old Rectory (these are listed below).

4b Statement of the CIO's policy on reserves

At 31 December 2024, the following funds were held in the accounts:

Restricted Funds	£41011
Designated	£48519
Totalling	£89530

Note

In 2023 a Restricted Grant of £60000 Grant made by the Westminster College Oxford Trust (WCOT) was credited to the accounts, a substantial part of that grant has been expended during 2024.

In 2024 A grant of £191,160 was awarded from the National Lottery Heritage Fund (NLHF). Currently £11,136 has been spent from that fund but no income has been claimed into the accounts. It is this deficit that is shown in the funds.

Reserves Policy for General and Designated Funds

The annual turnover of Epworth Old Rectory is usually in the region of £100,000. This is income from trading, grants and donations that support its core work. This core work includes the employment of staff, maintenance of our mission, and the running and maintenance expenses of the property.

The desired level of reserve which the Directors feel can be justified is about half the annual turnover on this core work (i.e. £50,000)

The balances in these funds at 31/12/2024 are shown in section 7e of this report.

The surplus in the accounts is calculated as follows:

1. Total balances held in all accounts (3217 + 120656 + 613)	£124540
2. Resources held in designated and restricted funds	£89529
3. Advanced payment made on the NLHF project	£11136
SURPLUS SUM (1-2-3)	£23878

This surplus is only half the sum that the Directors feel able to justify as reserve.

Reserves Policy for the Restricted Funds

Three restricted funds are held: the Samuel Wesley Library Fund, the "Wallpaper project" and a grant (£60000) from the Westminster College Oxford Trust. The money in the first two accounts is restricted for specified purposes. The WCOT fund supports a two year project which is headed up by a newly appointed (January 2024) Outreach, Learning and Engagement Manager; the grant is used for the employment of this officer and to support the work)

4c Funds materially in deficit

There are no funds in deficit at the time of reporting.

4d Exceptional circumstances

- The footfall at EOR has continued to be less than at the pre-covid level, but the signs are that recovery is in process.

- During 2024 the resignation of the two managers and the appointment of their replacement has had a negative impact on the income generated, but this has been partially offset by some non- payment of salaries during the year.
- In 2024 EOR reported a “serious incident” to the Charities Commission. It is referenced by the Charities Commission as “Incident Number 710214”. It was reported as putting finances and reputation at risk.

4e Principal sources of fund raising

The Trustees of Epworth Old Rectory wish to acknowledge the following bodies which have supported their work:

- The World Methodist Council (Annual Grant)
- The Priority Fund of the British Methodist Church (The Methodist Conference which met in July 2014 approved an annual Grant. This is to be directed to the employment of a suitable qualified Manager and will be increased annually in line with measure of inflation).
- The Arts Council
- Epworth Town Council
- Association of Independent Museums (various Grants)
- Museum Development Yorkshire (Grant and support)
- Westminster College Oxford Trust
- The National Lottery Heritage Fund (NLHF)
- The Royal Society
- MWiB with whom an agreement has been established (see below)
- The Friends of Epworth Old Rectory (Annual Membership and Donations)
- The volunteers at Epworth Old Rectory (see 4.a above)
- Donations
- Gift Aid

5 OBJECTIVES AND ACTIVITIES

5a Summary of the objects of the charity set out in its governing documents

The Objects of EOR(Ops) are: “To advance education by the establishment and maintenance of a museum at the historic building identified as Epworth Old Rectory. This museum dedicated to the influence of the Wesley family on faith, social justice, worldwide Methodism and all people today, whether they are of any religion or none.”

This object is supported by

- Preserving and caring for the fabric of the historic building (Grade I listed: Epworth Old Rectory, 1 Rectory Street, Epworth, Lincolnshire), the site and its immediate surroundings, and the collections.
- Providing an enhanced visitor experience and making Epworth Old Rectory accessible to as wide an audience as possible.
- Ensuring that Epworth Old Rectory is financially secure in both long and short term.

5b How these objects are addressed and strategies for achieving them

During 2024 the following activity supported our objectives:

- The Rectory was open to visitors and pre-booked tour groups for 4 hours a day, 4 days a week, from 1 April to 31 October (and also flexibly outside these times for pre-booked groups and events);
- We offered a variety of activities and an events programme, welcoming new and more diverse – visitors and users from across the world;
- We continued to care for our Museum collections and to make these objects accessible, including working with the Methodist Women in Britain organisation, as well as exhibiting different items from our collection at the Rectory and loaning objects to other Museums within the Methodist family;
- We sourced and gained funding to continue and expand our activities and impact. This included £191,160 from the National Lottery Heritage Fund, for ‘Out of the Box: unlocking collections at Epworth Old Rectory’, The Pilgrim Trust, through AIM, to fund up to £900 worth of conservation on our damaged coverlet, and £800 for a new Memory Garden Project, from Epworth Town Council;
- We continued to design and deliver projects within the Westminster College Oxford Trust grant (£60,000) for a two-year project improve our outreach, learning and engagement activities and funds from the Royal Society (£3,488) for works to improve the Physic Garden (in 2024-25)
- We began an enhanced programme of social media promotion to engage with the local and wider communities through a variety of posts concerning our shared Methodist and local history, what’s happening at the Rectory and to increase Volunteer recruitment.
- We began enhanced planning work on the operation, health and safety, building maintenance, and security, to ensure the future of the Grade 1 listed Old Rectory building for its future care and development and researched sources of possible future funding, to be applied for in 2025

5c Review of the charitable activities during 2024

2024, proved to be a challenging year, not least because of the staff turnover including the departure of the Strategic Manager, Jane Hubbard, in May, and the Visits and Collections Manager, Anya Johnson, in October. The Rectory therefore operated at a significantly understaffed level for most of the year, although Sarah Friswell stepped in to take on much of the role of the Strategic Manager until Sarah Maltby was appointed on October 8th, and it was necessary for the remaining staff team to commit to some increased hours to cover the work load. This continued between October and January 2025, as we did not appoint our new VCM, Ami Wagner, until that point.

Overall visitor numbers were helped by strong attendance at our 26 events in 2024, in particular Epworth Music Day which attracted 1,300 visitors, reaching 3,815 in person visits compared to 4,013 in 2023 – a 5% reduction. This includes a larger decrease in group bookings, which fell by 34% from 811 in 2023 to 532 in 2024. This perhaps, reflects the increased workload created by the vacant staff positions, while the remaining staff, necessarily, had to spread themselves thinner and therefore could not provide the previous focus on facilitating visits.

In addition to visitors to the Rectory, the appointment of Lois Albans in January 2024, as our Outreach and Learning Manager funded through the generous grant from Westminster College, meant that we could, not only, start to develop our in-house learning offers for schools to visit the Rectory, but also begin to undertake outreach in the community. Lois, therefore, delivered outreach sessions to 356 children in schools through assemblies and workshops and to 10 adults delivering a talk on her activities, as well as working with 80 young people online. As such, we delivered 522 learning interactions this year.

Also, with the help of the National Lottery Heritage Grant that was awarded in mid-2024, we developed a new 'Reminiscence Café' designed to engage with people living with dementia, their family and their carers. This took place on one Wednesday per month and benefitted 80 people who came along to these sessions (this work is ongoing). Lois also spent a large proportion of her time developing our learning Loan boxes and Community Discovery Boxes to be launched in 2025. Taking all of this activity into account we engaged with 700 people in our communities in 2024.

In total, we achieved income of £20,305 through our staff and volunteer activities, which is a reduction of 5% from 2023 (reflected in our visitor numbers). Although our outreach work to achieve our mission, by reaching out to our local communities, created greater impact in 2024 by positively engaging with 700 people in our communities.

Our work throughout 2024, although challenging as noted by reduced staffing - now resolved for 2025, is an encouraging platform on which to build for the future, so that we are able to create increased impact and benefit in the future, in terms of:

- Hosting visits to the Rectory.
- Delivering special events for everyone.
- Offering learning opportunities for all that link to the national curriculum.
- Offering outreach opportunities and engagement for our wider communities.
- Opening up the garden for greater use by our local communities and for partnering local events such as Epworth Music Day and Epworth Open Gardens.
- Creating new and pertinent exhibitions that showcase our collections and the history of Epworth Old Rectory
- Enhancing and valuing our volunteer teams through recruitment, diversity and training.
- Building our profile through social media, our web site and partnerships throughout North Lincolnshire and beyond.
- Encouraging more people to volunteer with us and retaining our current team of enthusiastic volunteers.
- Achieving grants for projects and work that will enhance our offers, increase the diversity of our audiences, improve access, care better for our collection and enable us to make necessary repairs to the Rectory.

5d Levels of engagement

It is hard to fully capture the full picture of our levels of engagement at this point, therefore work will be developed in 2025 to evaluate and monitor figures, as well as impact and benefit, across our activity. We have, in fact dedicated a proportion of our grant from the National Lottery Heritage Fund, to undertake evaluation, both quantitative and qualitative, of our events and other work using this funding. This will include relooking at our audience development

plan to explore our current and potential audiences, as well as our strategic plan for the next three years. We can, with some certainty however, detail the following results:

BREAKDOWN OF 2024 VISITORS & USERS	NUMBER					DIFFERENCE 2023/2024	PERCENTAGE of overall
	2024	2023	2022	2021	2019		
Organised tour group visits (<i>no. of groups</i>)	532	811 (42)	445 (12)	51 (2)	953	-279	-34%%
Education sessions	166	142 (3)	31	0	67	+24	+17%
Outreach to Schools	356	0	0	0	-	+356	356%
Other Outreach & informal learning sessions	178	24 (5)	100	78	278	+154	+642%
Events organised or hosted by EOR	2077 (26)	1785 (11)	1012 (11)	188 (4)	2277	+292 (15)	+16%
'Casual' visitors	?	906	340	344	1059	+566	21.65%
Garden only visitors	?	517	370	312	-	+147	12.35%
Virtual Zoom-hosted talks (<i>no. of talks</i>)	?	0	48 (2)	236 (6)	-	-48 (2)	0.0%
Total audience	3,309	4,185	2,346	1,209	4,634		
(without casual visitors, garden visitors and zoom talks accounted for in 2024)							

5e Particular activities that have taken place in 2024

- A new Strategic Manager, Sarah Maltby, has been appointed.
- A new Visits and Collections Manager, Ami Wagner, has been appointed (to commence work in early January 2025).
- New Volunteers have been appointed and new teams created for Collections, Gardening, and Living History.
- The care of the building and collection has continued so that these are accessible to all: offering pre-booked tours and casual visits during set advertised times (from 1 April to 31 October) and also flexibly outside these.
- Our social media profile was improved and increased, bringing the Rectory and its stories to a wider and more diverse audience.
- Samuel's Study and the Master Chamber were reconfigured.
- Grants were achieved of £191,160 'Out of the Box' National Lottery Heritage Fund; £900 The Pilgrim Trust, through AIM conservation on our damaged coverlet, and £800 'Memory Garden Project', Epworth Town Council.
- Our computer and purchasing systems were upgraded using SumUp, to improve efficiency.
- Sessions have been developed and delivered for our local communities through our Reminiscence Café and Discovery Boxes.
- Workshops and sessions are in development for our learning programme and our new loan boxes are also in development.
- New products have been purchased for the shop range and an end of year stock take completed.
- We have delivered a series of events across the year.
- We have begun the development of the new Physick garden and worked with a local artist, as well as voluntary researchers to develop the content for the interpretation panels and website.
- An archaeology in the garden event has taken place, producing good engagement and a range of artefacts. This is being written up by the archaeologist to be presented in 2025 and through a new exhibition presented in the Granary.

- Work commenced on our Heritage Lottery Project, appointing the architects, designing the brief, and exploring the needs for repackaging the collection. A CIO Project Group was appointed to manage the project.
- A new wiring schematic has been commissioned in advance of the Heritage Lottery build and to help facilitate wiring checks and new wiring requirements in the future.
- A project to complete a new series of Risk Assessments has commenced and Keith Drakes, a current volunteer, has been appointed to help complete this and assist with other necessary health and safety work.
- The freezer shed and old toilets have been cleared and a new shed purchased to store outdoor equipment and garden tools in advance of the Heritage Lottery building work to take place.
- The staff and volunteer's kitchen has been cleared and tidied to create a more useable and attractive space.

5f How these activities have been undertaken with awareness of legal requirements and Standing Orders of the Methodist Church in Great Britain

Epworth Old Rectory:

- has a finance management policy which is consistent with the requirements of the Charities Commission.
- has a Safeguarding Policy which derives from the Safeguarding Policy and good practice of the Methodist Church
- manages the security of the property in compliance with the requirements and advice of the Insurers.
- carries out major property work under the Property Consents oversight of the Methodist Church, using suitably qualified professional advisors who also consult with the relevant planning authorities.
- has a Health and Safety Policy which
- embraces the statutory requirements for the regular inspection of services and appliances.
- includes the preparation of risk assessments
- includes Health & Hygiene food practice & basic food hygiene certification
- is adequately insured for property, contents and third-party liability.
- has policies in place which are consistent with its status as an Accredited Museum

6 KEY OBJECTIVES FOR 2025

1. Provide an excellent visitor experience and make the site accessible to as wide an audience as possible
1.1 Provide a consistent, high quality, visitor welcome and experience
Continue to develop volunteer-led tours and progress self-guided infrastructure. Increase number of volunteers who can lead the tours and introduce team of stewarding volunteers for the holidays.
Introduce more living history into the Rectory with a new team of Volunteers
Provide refresher training opportunities for all volunteers
Refresh the website and ensure that it is fit for purpose at all times – add the learning content
Add directional signage to the garden to emphasise that people are welcome to visit it
Refresh Interpretation in house rooms
Review and reissue Interpretation Strategy (EOR 071)
1.2 Ensure building and site are interesting and enjoyable (+ safe and accessible)
Introduce temporary exhibitions into the Granary
Introduce temporary exhibitions in the MWiB Room
Redisplay the Master Chamber using more of the collection, highlighting themes and revealing unseen objects
1.3 Care for our current visitors
Develop hands-on room resources and more interest via theming, interpretation and volunteers
Develop family focussed tour – working with ‘Ultimate Image’ on digital resources that include a ‘treasure hunt’ and QR codes and WIFI
Offer programme of events and activities for all our visitors and users
1.4 Attract, welcome and engage an increased and wider audience
Plan and deliver programme of learning and engagement activities, both at the Museum and as outreach in the community – undertake evaluation to inform future work
Develop two school’s Wesley Weeks to attract wider school’s audiences for full or half days of activity '
Review Learning Strategy
Develop Garden tours and Living History in the garden during school holidays using new team of Garden Volunteers
Continue with our Dementia Friendly cafes and deliver our new Memory Garden Project (funded by Epworth Town Council
Develop and deliver a social media and communications strategy that is adhered to throughout the year, with material that is designed to engage with different audiences including new audiences and those that are hard to reach
Develop closer relationship with group tour operators – proactively sell themed and planned visits (i.e. take the lead instead of vice-versa). Seek out and contact new Group Tour operators
Design specific tours for overseas visitors and work with other heritage sites to promote cross-selling
Introduced ‘free for residents’ days during Epworth Open Gardens Events, Epworth Music day and Heritage Open Days weeks plus explore options for reduced rates for residents the rest of the year
Review Audience Development Policy (EOR068)
1.5 Enhance and Improve our Staffing & Volunteer Resources
Undertake regular Volunteer recruitment and training (particularly when the house is closed) and designate responsible ‘Team Leader’ for each volunteer team
Host regular Full team Volunteer meetings during the year (3) as well as individual Volunteer team Meetings – Tour Guides, Shop, Catering, Garden, Interactive, Collection
Circulate regular Volunteer Newsletters to maintain communication
Create Volunteer roles for each type of Volunteer
Improve systems for managing volunteers, including communication, data recording, training, etc. Review Volunteer Agreement (EOR 62) and Handbook
Source funding to extend OLEM role into 2028
Introduce and implement on-line timesheets, calendars and document sharing between staff
Refurbish the staff kitchen and install internal key code lock on internal door
2. Preserve and care for Historic building fabric and give access to Collections

2.1 Care for building
Improvements to building as funding allows – Devise a priority list for improvements and funding applications – starting with the stairs, the damp, the blinds and the lighting fittings
Create a maintenance plan for the next 3 years – with detailed focus on year 1
Complete outstanding work to the granary and toilets – re-pointing, hatch and gutters
2.2 Care for collections
Complete repackaging and imaging project for the entire collections
Move the collection to the new collections store
Review and reissue EOR 073 Documentation Policy and EOR80 Documentation Procedural Manual
2.3 Ensure that the building and external areas are safe and secure
Complete risk assessments for all actions and areas – store on line
Ensure all equipment and installations are properly installed, tested, recorded and reviewed – create calendar of testing requirements, Carry out regular annual reviews of such
Ensure staff and volunteers undertake necessary H & S Training – evacuation / emergency response team / risk assessments / use of extinguishers + additional training for BS
Install new Fire Alarm in House / review emergency exit signage and undertake annual Fire Risk Assessment
Review Security of house and gardens – external lighting / CCTV / Alarm system / Ring Door Bells
Carry out a lock and key inventory – to rationalise and organise the keys – making sure that we know who holds which key
Maintain and review all H & S policies as necessary. Complete review and reissue of EOR 45 Health and safety Policy
Carry out a document and storage audit – in reference to GDPR recommendations.
Implement a new procedure for accident reporting and ensure that first aid boxes are maintained at all time, and there are enough staff and volunteers that can provide first aid assistance (new training)
Review and reissue EOR 51 Fire and Security Policy
2.4 Provide physical access to building, site and collection
Reissue new plans for buildings – assigning numbers and standard names for each room
Apply for funding to improve the paths in the Garden to increase access
Review and reissue the Access Policy (EOR 070), and in so doing review the photo book tool for the first floor
Create room resources and develop interactives (see 1.3.1)
Although the house will be closed during the winter season – offer half house at half price (downstairs only) tours to group visitors – to allow us to carry of necessary maintenance on the stairs and on the first floor)
Develop the Resource Room as part of the OoTB project and market it's availability to universities and other researchers
Move part of the library to the new Research Room for use by researchers.
2.5 Provide virtual access to building, site and collection
Revise website and create new content
Add 3D tour of house to web site education pages
Explore creating an online catalogue of our library which can be used by researchers – to be grant funded
Introduce access tools that will enable people with mobility issues to virtually access the first floor of the house.
Complete work on on-line catalogue (on the website) Digitise Museum's collections and put these online (inhouse-in partnership with Oxford Brookes/Methodist Heritage)
3. Ensure EOR is resilient and able to meet future challenges and be relevant to future audiences – see all of section 1
3.1 Make the best use of staffing and resources
Ensure regular full staff and full Volunteer meetings, as well as team meetings and 1:1 meetings.
3.2 Develop our audiences
Review and reissue audience development plan EOR 68 – exploring potential new audiences / hard to reach audiences and a focus on international visitors
Increase visitor figures by (750 people) - 20% from 3,750
Increase schools' figures by 50%
3.3 Develop building, garden and resources

Develop temp exhibitions to gain donations, in the Granary
Deliver garden-based events & tours – including launch of the Physic Garden to introduce new income streams
Market school's resources and workshops to schools in the region to gain increased income and use funding (Westminster grant) to provide subsidised travel
Introduce self-led tours as an option in school holidays
Encourage use of the garden – including the development of a sensory / quiet garden space and memory garden funded by Epworth Town Council
Review retail offer – to remove slow / static stock and introduce products that could be more appealing
Introduce temporary exhibition programme in the house using the MWiB room and Master Chamber to gain return visitors and increase interest
Explore use of Granary for private hire – inc third party meetings
Review catering offer with Catering Volunteers to ensure current and extended offers can be achieved
3.4 Develop and improve EOR business model
Introduce Sum-up donations or QR code based in the house and granary
Introduce new pricing from April 2025
Redesign the Friends Organisation, in terms of pricing, communications and events.
Create and implement a marketing / PR strategy for Friends recruitment – including new flier with QR code for ease of joining
Explore opportunities to link Friends Organisations across the 4 heritage sites
Create and print a new donations flier, with QR code access to our donate web page to give to every visitor to the Rectory
Enhance and reorganise the booking system for groups to create more effective management
Explore opportunities to optimise and manage group visits across the 4 heritage sites (including international tour groups)
Undertake regular evaluation of our activities, using a standard feedback form and other methods to capture quantitative and qualitative data. Ensure all such data is evaluated regularly
Capture more useful data at point of entry – including postcode / country data / age and marketing (where they heard about us)
Explore legacies and create content for the web site
Review pricing prior to forthcoming season and install pricing in the shop and on-line
Improve business performance and meet targets
Introduce Sum-up donations or QR code based in the house and granary
4. Ensure financial security in both long and short term (see all of section 3)
4.1 Maintain a balanced budget
Manage all income and expenditure and meet targets – ensuring that accurate records are kept and shared with the staff team to promote awareness of ambitions
4.2 Increase earned income
Increase visitor figures by (750 people) - 20% from 3,750
Increase schools' figures by 50%
Enhance and relaunch the Friends Organisation
Create opportunities and literature so that our current and future visitors can donate to us in general or for specific campaigns.
Research and design an annual campaign calendar for fund raising via donations
4.3 Plan and budget for the future developments and opportunities
Make planned and opportunistic funding applications
Plan 2026 events and activities based on successes and otherwise of the 2025 season
Maintain relationships through ongoing contact with current and recent funders, to enable us to make new applications to them.
2026 budget is planned
4.4 Plan for future bids and long-term resilience
Make planned and opportunistic funding applications

5. Project based actions
5.1 Royal Society 'Places of Science'
Replant the garden to highlight original ideas in Primitive Physic
Install accessible pathways
Continue to develop range of plants working in partnership with other organisations and individuals (ie Trent View College)
Complete and install Interpretation
5.2 Heritage Fund 'Out of the Box'
Recruit and undertake training for new team of Collections Volunteers
Undertake repackaging and imaging project
Undertake and complete freezer store conversion
Undertake fit out of new collections store and move all objects into the new store
Complete fit out of our new Research room and library
Promote our new facilities to researchers and as part of store tours and heritage days
Reuse old Collections store as Resources room
Continue to organise loans to community (schools and older people)
Archaeology event and dig
Exhibition of finds
Games in the Garden – with banner signage
Online content to compliment the Games in the Garden
Programme of visits and workshops for schools linked to 'then and now' everyday objects
Improve collection knowledge through recruiting new volunteers and training
Move to new store
Create rolling programme of exhibitions, social media posts and web content
Using collections as a focus for social interaction and reminiscence – moving onto new Memory Garden Project
Creating interactives, handling collections and new team of Living History Volunteers to be used during self-led tours and living history days in school holidays
Using traditional objects as inspiration for new crafts and skills – during Living History Days and at Christmas – wreath and garland making etc
Work to attract with new and hard to reach audiences – comparing and contrasting heritage traditions from other communities.
Develop skills in living history events – recruit new team of Volunteers and develop range of presentations and performances to be employed throughout the year
Exhibitions on various themes using the wider collection
Banners and site boards whilst the work on the Collections store is taking place
Website material, create blogs and social media posts and maintain communication flow

7 ANNUAL ACCOUNTS FOR EPWORTH OLD RECTORY 2024

7a Independent examiner's report to the Directors of Epworth Old Rectory (Operations) on the accounts for year ended 31 December 2024 (set out on pages 13-16)

The charity's trustees consider that an audit is not required for this year (under section 44(2) of the Charities Act 1994 (the Act)) and that an independent examination is needed.

It is my responsibility to

- examine the accounts (under section 44 of the Act).
- to follow the procedures laid down in the General Directions given by the Charity Commission (under section 44(7) (b) of the Act). and
- to state whether particular matters have come to my attention.

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

In the course of my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in any material respect, the requirements:
 - to keep accounting records in accordance with section 41 of the Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 1994 Act;have not been met; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed **Barrie Campbell FCA (Glover and Co)**

Date **2/4/2025**

Signed copy with EOR Secretary

7b.1 Income – expenditure Account for CIO 1165387

REVENUE INCOME		ACTUAL TO 31 DEC 2023	BUDGET 2024	ACTUAL TO 31 DEC 2024	2005 Budget	
Income generated by volunteer activities	Admission	10603	11000	9807	10000	2
	Shop sales	3205	3500	5964	5500	2
	Catering	1531	2000	970	1000	2
	Events	6080	6000	3548	5000	2
Trustee commitments	MCiGB Core	41330	42000	41950	43000	3
	WMC Core	11320	11500	11286	11500	4
	WCOT Grant		30000			5
Supporter Donations	Alice Lockmillar	2281	2200	2476	2000	6
	Friends(sustainable subs)	1217	1500	1219	1500	
	Unrestricted (variable)	1319	1500	1651	1500	
Other Income	Interest and Gift Aid	4765	6000	5932	5000	5
	Other/Misc	367		2215		7
Transfers	Transfer	732				
TOTAL REVENUE INCOME		84750	117200	87018	86000	

REVENUE EXPENDITURE		ACTUAL TO 31 DEC 2023	BUDGET 2024	ACTUAL TO 31 DEC 2024	2025 Budget	
Supporting volunteer activities	Shop	2152	2500	3610	3500	
	Catering	512	750	258	250	
	Events	1509	2500	1318	2200	
	Hospitality/Volunt support	680	700	958	800	
Maintaining services and premises	Garden	238	500	147	850	
	Office	201	500	1357	750	
	Gas/Electric/Water	3298	6000	7580	6500	8
	Digital (telecom, B/B, cr /cd)	1573	1500	1806	1200	
	Small services	495	8500	1324	1700	
Museum./Mission	Travel	769	1000	386	1000	
	Training	0	500	102	500	
	Education	87	2500	0	500	
	Collection Management	736	1000	240	1200	
	Publicity	87				
	Governance	750	4000	1800	2000	9
	Subscriptions	143	200	166	200	
	Advocacy/publicity	60	1000	199	1200	
Employment	P/T staff	14770	15500	17404	17000	10
	Manager employment	34078	57000	28697	41000	10
	payroll	432	600		500	
Long term property/presence	Insurance	3212	3500	3286	3600	11
	Inspections	1648	1500	2607	2500	
	IT renewal and repairs	1276	1500	1467	1500	
	Property Rates	88	100	12	100	
	Structural Maintenance	1485		2409	4000	
	Miscellaneous	307		1279		12
TOTAL REVENUE EXPENDITURE		70585	113350	78412	95050	
REVENUE INCOME-EXPENDITURE		14165	3850	8606	-9050	

CAPITAL/PROJECT INCOME	ACTUAL INCOME TO 31 DEC 2023	ACTUAL EXPEND. TO 31 DEC 2023	ACTUAL INCOME TO 31 DEC 2024	ACTUAL EXPEND. TO 31 DEC 2024	12
PROJECT/DEVELOPMENT INCOME					
MWIB	500				
Epworth Town Council (2023) Grant	675				
Yorkshire Museum Grant (2023) Grant	600				
Reset Grant (Covid) Grant	481				
Westminster College (OLEM) Grant	60000				
Royal Society (Physic Garden) Grant			3489		
National Lottery Heritage Fund (OOB)			(191160)		13
Total Income	62256		3489		
PROJECT/DEVELOPMENT EXPENDITURE					
Development Project (P3)		1704		4938	
MWiB		476		Closed	14
Epworth Town Council Grant (2023)		648		Closed	14
York Museum Grant (2023)		617		Closed	14
Reset Grant (2022-3)		4665		Closed	14
Westminster College Grant (2023)		0		26086	
Royal Society Grant				2231	
Heritage Lottery Fund Grant		0		11136	15
Total Expenditure		8110		44390	
PROJECT INCOME-EXPENDITURE		54146		-40902	

COMBINED REVENUE AND CAPITAL/PROJECT ACCOUNTS

TOTAL ACCOUNT INCOME		147006		90507
TOTAL ACCOUNT EXPENDITURE		78695		122802
ACCOUNT INCOME-EXPENDITURE		68311		-32295
STOCK ADJUSTMENT		464		-471
ADJUSTED I-E		68775		-32766

7c Balance sheet

BALANCE SHEET		2024	2023	2022	2021
ASSETS					
CFB account		120656	147774	71679	60239
HSBC account at year (02/1/2025)		3271	8887	17355	27472
HMRC Recovered			234	0	0
EM Account in hand		613			
Stock		3904	3432	2968	4169
cash in hand		150	135	141	0
Uncleared cheque		-20		0	0
In Bank but not recorded		-11		-5	0
Over paid		-19	102	0	0
Debtors (unpaid invoices)		-78	481	0	0
TOTAL		128466	161045	92138	91879
LIABILITIES					
Creditors (unpaid invoices)		470	874	740	7910
Sum of liabilities		470	874	740	7910
Net current Assets		127996	160172	91397	83970
REPRESENTED BY					
Accumulated Fund					
Balance at 1 Jan 2024		160172	91397	83970	116483
HSBC OVER PAYMENT				234	
Adjustment		590			
Add Net Income-Expenditure		-32766	68775	7194	-32513
Net Current Assets		127996	160172	91397	83970

The accounts were approved by the Directors on 25 February 2025

And signed on their behalf by:

Sarah Friswell **SF** (Chair)

Stuart Gunson **SG** (Treasurer)

(Signed copies with Secretary)

7d NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 DECEMBER 2022

1. Accounting policies

(a) Basis of preparation: These financial accounts have been prepared on the historical cost basis.

(b) Assets employed: The ownership of the property is with the World Methodist Council, and therefore no value for the property is included.

2. The income generated by the volunteers is similar to 2023. The footfall has decreased, but the shop sales have increased; the significant change in the events income can be in part be attributed to the loss of a major fund-raising event.

3. This is the annual commitment from the MCiGB to support EOR.

4. This is the Annual Commitment from WMC to support EOR.

5. The Grant from Westminster College Oxford Trust (WCOT) has continued to earn interest, though this will diminish as the capital continues to be spent.

6. Alice Lockmillar: an Endowment Fund administered by Florida United Methodist Foundation and paid via WMC

7. The high 'miscellaneous' includes two advance payments for the restoration of a damaged coverlet (an Insurance payment and a grant from the Association of Independent Museums. The miscellaneous expense includes some gift payments to leaving staff and one charity event: the gifts made to Lindsey Lodge Hospice at an event on EOR site were paid through our accounts

8. It is anticipated that the fuel elements of the utility services will show a sharp increase

9. Governance includes travel and expenses of Directors and the Independent Examination of accounts

10. From January 2024, all remunerations were increased. The Support staff are paid the National Living Wage Foundation Living Wage and the Managers are paid at two tiers, the Strategic manager at one level and the Visits/Collections Manager and the Outreach/Learning/Engagement Manager at a second level. The change of staffing during the year has resulted in less being paid out in salaries.

Note: the OLEM is paid out of the WCOT grant.

11. It is anticipated that the cost of Insurance will increase significantly this year.

12. The Capital/Project income/expenditures is based on grant funded or resource funded expenses. The main sources of income are grants which are frequently awarded in one year and spent in the next. There are two projects (Library and Wallpaper) which have had no activity this year. They are not shown in the accounts, but are recorded in the Funds (Section 7e)

13. The National Lottery Heritage Fund awarded a grant of £191160 during 2024. This requires EOR to make payments in advance and claim from the award at staged intervals. No money has been drawn down to date, and the award is therefore shown in bracket but not included in the accounts. Payments are therefore currently paid out of EOR funds.

15. There were 4 Grants awarded in 2022 and spent in 2023 which had very small balances (some negative and some positive) and at the start of 2024, the Directors agreed to close the accounts. A net balance of £182 was transferred into the general account.

16. EOR opened an account with "Equals Money" to provide staff members with pre-loaded cash cards. The increased use of mail ordering and requests for prepayment before delivery makes this a more practical than relying on reimbursing staff or a greater use of petty cash. At the end of the year there was £613 unspent in the account.

7e FUNDS

Some of EOR resources are identified in a number of funds. Most of these are designated or restricted to particular pieces of work.

These are set out below and the closing balances shown are the balances at 31 December 2024

Neither the Library nor the Wallpaper project fund have been used during 2024, but their values are included here.

The EOR contribution onto the Out of the Box Project is identified below and is funded by a transfer from the WMC fund which is designated to property work. The Grant has been awarded, but is not yet a material asset and is therefore not shown.

Designation	Source of fund	Purpose	Starting balance at 1/1/2024	Income 2024	Expenditure 2024	Transfers	Balance at 1/1/2025
Designated	MCiGB Core	Employment and governance	29949	41950	-46100		25799
Designated	**WMC Core	Property	29020	11286	-14968	-11136	14202
Designated	Development	Property	13456	0	-4938		8518
Restricted	Library	Purchase of books	4838		0		4838
Restricted	Wallpaper	Design of wallpaper	1000		0		1000
Restricted	WCOT	Grant	60000		-26086		33914
Restricted	RS Garden	Grant	0	3489	-2230		1258
Restricted	*HLF (OOB)	Out of the Box Project	0	0	0		0
Restricted	OOB (EOR)	Out of the box project			-11136	11136	0
Totals			138263	56725	99854	0	89530
*NLHF grant awarded is 191160. This is paid in instalments retrospectively to cover spending							
**The Open the box (OOB) project requires advance funding from EOR, this has been taken from the WMC core fund.							