

	Trustees' Annual Report for the period							
	From	Period start date			T o	Period end date		
		Day 1	Month 10	Year 2023		Day 30	Month 09	Year 2024



Charity name	Suffolk Archives Foundation (SAF)	
Other names charity is known by		
Registered charity number (if any)	1170463	
Charity's principal address	57 Stratford Road	
	Ipswich	
	Postcode	IP1 6EF

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Peter Gray			SAF
2	David Davies	Treasurer		SAF
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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

Name	Dates acted if not for whole year

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Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Trust Deed
How the charity is constituted (eg. trust, association, company)	CIO
Trustee selection methods (eg. appointed by, elected by)	<p>Apart from the first charity trustees, every appointed trustee will be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees.</p> <p>In selecting individuals for appointment as appointed charity trustees, the charity trustees will have regard to the skills, knowledge and experience needed for the effective administration of the CIO.</p>

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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

The advancement of education for the public benefit by means of grants, human resources, educational services, advocacy and advice to promote, maintain and improve the archive service in Suffolk.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Mission:

To undertake a wide range of activities ensuring the preservation, accessibility, and recovery of Suffolk's nationally and internationally significant archives.

Initial Focus:

The CIO (Charitable Incorporated Organisation) was initially established to provide grants supporting the construction and equipping of The Hold, a new archive and heritage centre in Ipswich. This facility was developed through a partnership between Suffolk County Council and the University of Suffolk. While the CIO operates independently of both institutions, it maintains close collaboration with the project. However, the CIO will not engage in activities related to the day-to-day operations of these organisations.

Fundraising & Collaboration:

Initial fundraising for The Hold was led by The Friends of Suffolk Record Office. Moving forward, the CIO will take the lead in fundraising for The Hold and future major projects essential to supporting Suffolk's archive service. This includes the transfer of existing funds raised, enabling The Friends of Suffolk Record Office to focus on their primary objective: acquiring at-risk archives relevant to the county.

The establishment of the CIO does not exclude The Friends of Suffolk Record Office or other local history charities from fundraising for the archive service. Instead, it aims to complement their efforts.

Future Role:

The CIO is expected to support future projects that enhance the facilities and services of the Suffolk Archive Service.

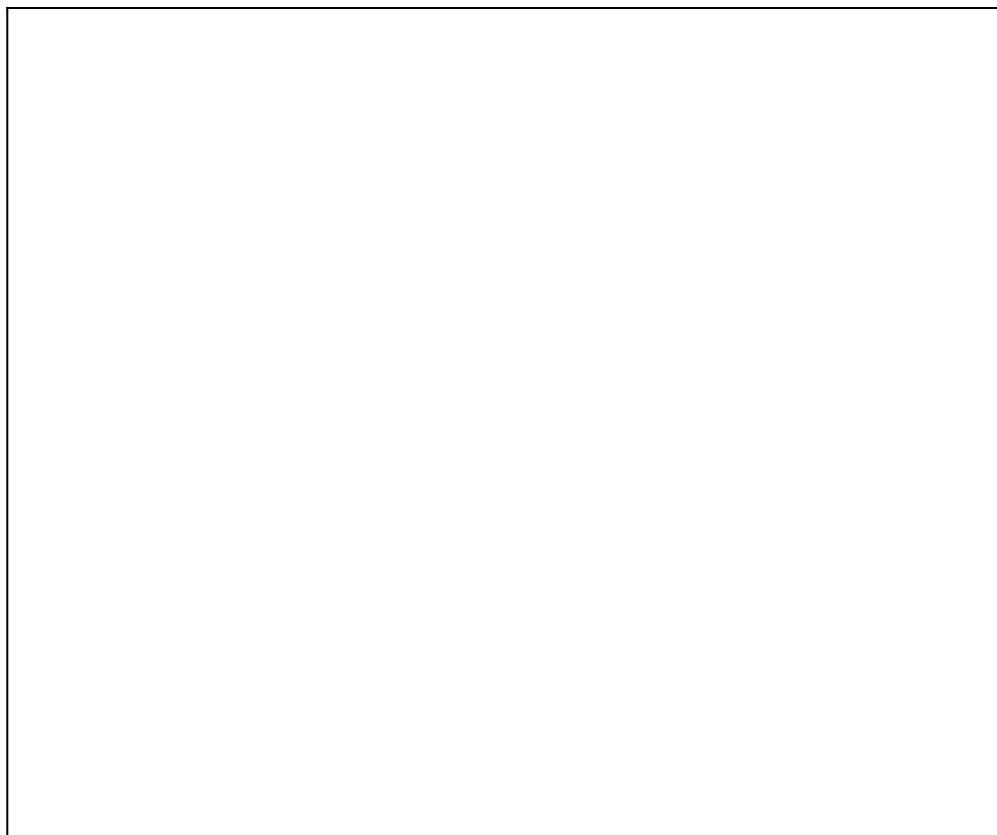
Governance & Expertise:

The CIO is governed by trustees with extensive experience in fundraising and the archive sector. It also benefits from professional advice provided by Suffolk County Council's qualified experts involved in The Hold project.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.



Summary of the main achievements of the charity during the year

We were down to two trustees at the end of this financial year which limited our ability to make new decisions. We are actively recruiting for Trustees. We are liaising with Suffolk Archives with regard to transfer of funds raised for The John Blatchly Local Studies Library. We promoted all exhibitions held at The Hold via our website. We were also able to facilitate the transfer of funds from a local family history society to Suffolk Archives for the upkeep of their collection of records.

Brief statement of the charity's policy on reserves

Grants will be made periodically to Suffolk County Council to support the delivery of the Hold following any successful fund raising activity. Reserves of £5k will be retained to ensure funds available for fund raising activity.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Section F

Other optional information

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

Signed on behalf of the charity's trustees

Signature(s)



Full name(s)

David James Davies

Position (eg Secretary, Chair, etc)

Trustee & Treasurer

Date

10th July 2025

Suffolk Archives Foundation		1170463			
Receipts and payments accounts					
For the period from		Period start date 1 October 2023		To Period end date 30 September 2024	
CC16a					

Section A Receipts and payments

	Unrestricted funds		Restricted funds		Endowment funds		Total funds		Last year
	to the nearest £		to the nearest £		to the nearest £		to the nearest £		to the nearest £
A1 Receipts									
Donations	-		1,436		-		1,436		-
	-		-		-		-		-
	-		-		-		-		-
	-		-		-		-		-
	-		-		-		-		-
	-		-		-		-		-
	-		-		-		-		-
	-		-		-		-		-
Sub total(Gross income for AR)	-		1,436		-		1,436		-
A2 Asset and investment sales, (see table).									
	-		-		-		-		-
	-		-		-		-		-
Sub total	-		-		-		-		-
Total receipts	-		1,436		-		1,436		-
A3 Payments									
Refund of Grants	-		-		-		-		3,252
Expenses	-		-		-		-		174
Grants to Suffolk Archives	-		1,275		-		1,275		3,395
	-		-		-		-		-
	-		-		-		-		-
	-		-		-		-		-
	-		-		-		-		-
	-		-		-		-		-
	-		-		-		-		-
Sub total	-		1,275		-		1,275		6,821
A4 Asset and investment purchases, (see table)									
	-		-		-		-		-
	-		-		-		-		-
Sub total	-		-		-		-		-
Total payments	-		1,275		-		1,275		6,821
Net of receipts/(payments)	-		161		-		161		- 6,821
A5 Transfers between funds	-		-		-		-		-
A6 Cash funds last year end	15		35,665		-		35,680		42,501
Cash funds this year end	15		35,826		-		35,841		35,680

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Barclays Bank plc	15	35,826	-
		-	-	-
		-	-	-
	Total cash funds	15	35,826	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-

				-	-		
				-	-		
	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)			
B4 Assets retained for the charity's own use			-	-			
			-	-			
			-	-			
			-	-			
			-	-			
			-	-			
			-	-			
			-	-			
	Details	Fund to which liability relates	Amount due (optional)	When due (optional)			
B5 Liabilities			-				
			-				
			-				
			-				
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval				