

# Bakewell and District Historical Society

## Trustees' Annual Report

1<sup>st</sup> January 2023 to 31<sup>st</sup> December 2023

**Charity Name:** Bakewell and District Historical Society

**Other Names it is known by:** Bakewell Old House Museum, BDHS

**Registered Charity Number:** 1184842

**Charity's Principal Address:** Bakewell Old House Museum, Cunningham Place, Bakewell, DE42 1DD

### Names of Trustees who manage this charity

Name	Office	Dates acted if not for whole year	Name of person (or body entitled to appoint trustee (if any)
Ken Smith	Chair from AGM	From 25/04/2023	
Sir Kevin Barron	Chair to resignation	To 15/03/2023	
Stephen Coates		To 18/05/23 (AGM)	
Marian Barker			
Lesley Ayers	Treasurer		
Emily Bowyer			
Eleanor Whitehead	Secretary		
Megan Jones			
Emma Harrison		To 12/03/2023	
Alison Edwards			
Lisa Simpson		From 17/07/2023	
Peter Mahood		From 16/07/2023	
Richard Hildebrand		From 16/07/2023	

### Structure and governance and management

Type of governing documents: Bakewell and District Historical Society – constitution at incorporation – August 2019

How the charity is constituted: Incorporated

Trustee Selection methods: Adverts and consultation with MDEM, interviews

# Trustees Report 2023

## Overview

The Bakewell and District Historical Society has seen some changes over 2023, with the welcoming of Ken Smith as our Chair and three additional trustees to broaden the board expertise. The society talks programme has been re-established from September. The museum has engaged fewer visitors than previous years which we believe reflects the downturn in economic growth and the post-Covid reduction in opening days per week, from seven to five. For 2024, we have an exciting programme of talks and workshops based around our new Treasured Quilt exhibition. Work over the winter will move the Reception Area to the Industrial Gallery building to enable enhanced visitor experience of the Tudor Hall. We shall open 7 days a week to regain pre-pandemic audience numbers by recruiting a Museum Assistant. We have engaged a graphic consultant with the assistance of grant funding to develop a museum branding in early 2024. We are positive about our programme and experience for visitors for 2024.

## Our Vision and Values

These were given in our annual report 2022, but it helps to highlight them and focus on them again this year.

### Our vision

To offer a gem of a museum that is fun, interesting, and inspiring to all, loved by locals and visitors alike. We will tell the story of our areas and its people in a unique and compelling way, creating connections with the past and our visitors.

### Our Mission

We will preserve and vitalise our collections for future generations so that our communities continue to engage with and discover the history of Bakewell and this part of the Peak District

### Our values

Brand values are the behaviours we consistently adopt to achieve our purpose. The following are such 'behaviours' but using that term may feel slightly officious.

- **Welcoming** – do everything with open arms
- **Providing satisfaction** – great customer experiences lead to happy faces
- **Learning**– our curiosity knows no bounds and its fruits are widely shared
- **Engaging** –harness Arkwright's energy and entrepreneurialism
- **Leading**– bravely forge new paths
- **Belonging** –foster a sense of place with passion
- **Being accountable** – it's up to all of us, we all play a part

Our purpose

Our purpose is to stimulate an interest and love for Bakewell and the wider Peak District by bringing to life our shared stories.

The Business Plan is designed to meet the following strategic goals, with the first being of the highest priority:

- Ensure the financial sustainability of the museum
- Increase our visitors and develop new audiences, widening access
- Develop the workforce
- Maximise the use of collections and maintain the building's fabric
- Strengthen the governance of the organisation
- Increase the effectiveness of our marketing and promotion
- Improve the customer experience; introduce quality metrics

## People

We continue to be very grateful and thankful for the commitment of Mark Copley our museum manager for organising volunteers, seeking out grants and managing the museum and bringing the museum to the lively centre and hub of activity that it is now. A huge thank you goes to Mark for his enthusiasm and dedication to the museum.

On the BDHS board, we said goodbye to Sir Kevin Barron (Chair) and Emma Harrison at the beginning of the year. Thank you for your contribution to the society and museum. We said hello to Ken Smith as Chair, and to new Trustees Lisa Simpson, Peter Mahood and Richard Hildebrand who all bring a wealth of experience in different fields to the board. A huge welcome to all of you. We also said goodbye to Stephen Coates as a trustee who stepped down after 6 years on the board (most of these as Chair) and who was instrumental in overhauling the governance of the society and its institution as a Charitable Incorporated Organisation (CIO).

We also welcomed Linda Latif as Membership Secretary, she is also a volunteer at the museum helping Mark with administration duties. With the appointment of Linda, we said thank you to Anne Smedley who took on the membership role a few years ago.

Museum activities were delivered by our fantastic volunteers, providing over 3000 hours of volunteering time, the number of active volunteers is currently 60. A recruitment drive for more volunteers was undertaken in the Spring, with every household in Bakewell leafleted with a special volunteering pamphlet. This will be extended to neighbouring villages in 2024, and an online campaign will be launched in Spring 2024.

## Activities

The museum opened for the season on March 25<sup>th</sup>, 2023, and engaged with over 6000 visitors until closing on 5<sup>th</sup> November 2023. A temporary exhibition for the year, "Bowls in a Fragile World" was housed in the Solar with a talk about the exhibition held in July. A

shorter-term temporary exhibition "A Stitch in Time" looked at Bakewell schools, and concentrated on girls' education and needlework samplers. A pop-up exhibition *Bakewell Now and Then* produced by Richard and Mark was held in the Visitor Centre from the autumn into 2024, showing photographs of Bakewell. A costume grant from 2022 bore fruition at the opening of the museum with costumes available for visitors to try on whilst in the museum.

The Learning Team welcomed schools to the museum on 12 occasions, providing town tours and museum sessions. The larger groups have returned for a second year and look to be repeat visitors each year.

60 visitors and 5 volunteers participated in our *Secrets and Legends* town tours, which was provided by a very enthusiastic team of volunteers on Thursdays and some Tuesdays. There were eight group bookings including those from U3A organisations and a literary group from the USA.

We developed partnerships with the Level Centre (Rowsley) and Junction Arts who provided free family activities in the summer as part of our World in Miniature theme. The Level Centre will be providing an exhibition in 2025 with their Youth Collective co-producing the exhibition in response to our collections and stories. Also, a talk to the Chesterfield embroiderers by Mandy and Stephen, in November, started a project for the embroiderers to display work in the museum during 2025.

A neighbours Coronation Street Party (held indoors due to the weather) was hosted at the museum and a Plant and Cake stall held over the summer.

Social Media continued to reach out to our audiences with the help of Megan and volunteers. The highest performing Facebook post was for our Trustee recruitment in May 2023 (a paid advert). The greatest Instagram reach was a video showing Stephen, our volunteer gardener. The greatest number of comments was via a Facebook post showing postcards of local pubs through time, collated as a *Pub crawl through Time*.

Over the year, the Society gained five grants totalling £ 3,298.58, We also received help-in-kind from Museum Development East Midlands (MDEM) for an Energy Audit, and some Organisational Health support.

- MDEM Small Grant £1,164.00 Development of our Branding
- Derbyshire Dales Local Projects Fund £200.00 Unrestricted grant
- MDEM Workforce Development £315.00 Trustee attendance at Museum Association Conference
- Provincial Grand Charity of Derbyshire £1,000.00 Unrestricted grant
- Bakewell Town Council Grant £619.58 Equipment for Talks programme

The Keeper of the Collections, Marian Barker, has continued work with the cataloguing, re-boxing and importantly rationalisation of the collection. Similarly, the Keeper of the Costume Collection, Kelsey Power, has prepared a great deal of items for rationalisation. She also led a popular Heritage Open Day behind-the-scenes event.

A further opportunity for volunteer recruitment is the Membership. We had social gatherings at the beginning, middle and end of the season, as well as the Summer Social. It is repeated many times that we cannot operate without our volunteers, but is always worth stressing this as we express our gratitude for what they give.

Seasonal events included a “Famous bunny” trail at Easter, half-term children’s activities, Summer fun miniature worlds including an Arts Awards project, a link with Georgian Derbyshire Festival, Heritage Open Days and in October decoration for Halloween. “The Terrifying Tudor House-The Musicians Stay Over”.

Ken has single-handedly re-established the talks programme with some of the talks being:

- Recent Work at Beauchief Abbey – by Colin Merrony,
- The Air of Freedom – the boot and shoemakers strike in Eyam and Stoney Middleton, 1918-1920 – Steve Bond.
- Castleton Medieval hospital – Angela Stafford.

## **Thank you**

The museum couldn’t operate without its volunteers. Many volunteers have worked on the exhibitions, collections, updating our catalogue and other records, and performed many other valuable roles throughout the year. Specialist roles include photography, social media and DIY. Volunteers provided admin support, catering, tours of the town and museum, and engage with school children. A special thank you goes to all our volunteers who have helped in many ways throughout the year.

## **A word from our Chair:**

As has been said quite often about the Society and Bakewell Old House Museum, we punch above our weight; and so we continue to do in these increasingly straitened times. As has also been noted before, this is only possible because of the dedication, loyalty and stamina of our museum volunteers, in each and every role that they perform, whether front of house or behind the scenes, under the inspirational leadership of our Museum Manager, Mark Copley. And that includes our Trustees and the time they give, in guiding and supporting the direction in which the Society is travelling. I wish to add my sincerest thanks to those already given in the document above for all the work that has been done and the results that have been achieved in 2023.

As we move into 2024, our volunteer numbers are increasing, we are looking to open again for 7 days each week during our season and to increase our visitor numbers, not least so that our grant-aided Assistant Manager can be supported in future years through our own income streams. The Board has begun to look at the governance structure of the Society, to ensure that it is fit for purpose for now and the immediate future and anticipate a Visioning process in the near-future, with appropriate consultation of the Society membership, to chart ways forward that benefit our visitors and their enjoyment of Bakewell and its environs, as well as our museum and what we hope will be an increased and increasing membership in 2024 and beyond.

BAKEWELL & DISTRICT HISTORICAL SOCIETY  
Charity Number: 1184842  
STATEMENT OF FINANCIAL ACTIVITIES  
Year ended - 31st December 2023

Income and Expenditure

	2023		2022	
	Restricted	Unrestricted	Restricted	Unrestricted
	£	£	£	£
<b>Incoming resources</b>				
<i>Voluntary Income</i>				
Members subscriptions		1,852		2,008
Society Events		1,548		443
Donations and Bequests		1,542		515
Grants	2,099	2,289	10,439	2,667
<i>Activities for Generating funds</i>				
Museum receipts		40,446		42,394
Gift Aid		4,442		6,267
<i>Investment Income</i>				
Bank Interest		989		183
<b>Total Incoming resources</b>	<b>2,099</b>	<b>53,108</b>	<b>10,439</b>	<b>54,477</b>
<b>Resources expended</b>				
<i>Governance costs</i>		100		100
<i>Charity Expenses</i>				
Publications and talks		1,921		1,862
Projects	3,482		7,757	425
<i>Charitable Trading activities</i>				
Wages		20,472		19,919
Service and subs		5,512		7,186
Insurance		2,350		2,947
Capital Items and repairs		1,361		1,849
Marketing		2,849		2,181
Events and Stock		4,042		4,188
Museum and Office				
Consumables		1,997		2,566
<b>Total resources Expended</b>	<b>3,482</b>	<b>40,603</b>	<b>7,757</b>	<b>43,223</b>

	2023		2022	
	Restricted	Unrestricted	Restricted	Unrestricted
	£	£	£	£
<b>Movement of Balances</b>				
Net Incoming resources for year	-1,384	12,505	2,682	11,254
Fund balance bf 1 Jan	2,682	90,739	0	79,485
Fund balance cf 31 Dec	1,298	103,244	2,682	90,739

<b>Statement of Assets and Liabilities at year end</b>			
<b>BANK BALANCES at 31st December 2023</b>			
			£
Saffron Account			41,246
Co-op			63,214
Petty Cash			82
<b>Total Assets</b>			<b>104,542</b>
<b>Liabilities</b>	None	Income and expenditure accounting used	
<b>Assets</b>		Museum building transferred in January 2021 - see note	
<b>Retained funds</b>			£104,542

**Note to the Accounts:**

The accounts have been prepared with reference to SORP Section 27.12 in relation to the charity reconstruction and merger of the unincorporated charity 1027732 and the incorporated charity 1184842. The heritage asset of the museum building has not been valued and has been transferred from the one charity to the other. There is no requirement to put the building on the balance sheet.

The above accounts have been prepared by the Treasurer and Chairman of the Trustees, who are content with an independent examination rather than a full audit.

Signed Ken Smith Name Ken Smith (On behalf of the Board)

# Independent examiner's report on the accounts

## Section A -Independent Examiner's Report

Report to the trustees/ members of: **Bakewell & District Historical Society**

On accounts for the year ended: **31 December 2023**

Charity Number: **1184842**

Set out on pages 6 and 7

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31/12/2023**. As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act"). I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed 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 (other than that disclosed below) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

Signed: *B. Sands*

Date: *11.3.2024*

Name: *BRENDA SANDS, ASSET ACCOUNTING SERVICES*

Address: *7 YORK ROAD, BROTTON*

*SALTBURN BY THE SEA. TS12 2XF*

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



## ***Section B: Disclosure***

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

**Give here brief details of any items that the examiner wishes to disclose.**