

Trustees' Annual Report for the period 01/Jan/2022 to 31/Dec/2022

Charity name: HOLSWORTHY MUSEUM

Charity registration number: 1187705

Introduction

The formal transfer of assets from Holsworthy Museum Society (Charity No: 1055088) was finally completed in January 2022. This report therefore covers the first year that the charity was fully operating as a Charitable Incorporated Organisation (CIO)

Objectives and Activities

In summary, the purpose of the charity, as set out in its governing document, is to collect and preserve artefacts linked to the history of Holsworthy.

Its main activities are the managing, documenting, conserving, and safeguarding the museum collections and holdings; to exhibit, interpret and provide access to the museum collection and holdings; to provide material, evidence and associated information and learning experiences and activities relating to the objects in the collection; and to research, promote and publish studies of the area.

The Trustees will continue to provide a facility for informing and educating the public about the history of Holsworthy and its environs by running and managing Holsworthy Museum for the benefit of the public.

The Trustees recognise the importance of the contribution volunteers will make in enabling them to continue to fulfil the charity's Objects and Activities.

Achievements and Performance

The Museum is open to the public from March/April – December each year. The closed period is used for housekeeping, collection care and cataloguing and the Trustees appreciate the commitment of volunteers to enable this work to be carried out.

Financial Review

The Charity's reserves will continue to be held in a savings account for ease of access if required. Reserves are required to ensure that the Museum can continue to cover the cost of overheads in the event that no income is received. The Museum is normally closed for a period of 3-4 months during the winter and therefore the minimum level of reserves maintained is 6 months operating costs.

Visitor numbers recovered during 2022 and their donations were only slightly down on pre-covid levels, nevertheless costs have continued to increase, resulting in a deficit for the year.

Additional information

The Charity will start the next financial year in a healthy financial position relative to its size and operating costs and will continue to rely upon income from grants, voluntary donations from visitors, users of the Service Point.

The charity is entirely reliant upon volunteers and the biggest risk will be a loss of volunteers. Many current volunteers are elderly and family commitments impact their availability from time to time.

Structure, Governance and Management

The charity is a Charitable Incorporate Organisation governed by a Constitution.

The Museum is dependent upon the skills that an individual can bring to the management of the Museum, which is wholly reliant upon volunteers to ensure that it continues to comply with governing legislation and the requirements of Museum Accreditation. These factors will be a primary consideration when selecting Trustees who are asked to commit for a minimum period of 3 years

Reference and Administrative details

Charity name	Holsworthy Museum
Other name the charity uses	None
Registered charity number	1187705
Charity's principal address	Manor Offices North Road Holsworthy DEVON EX22 6DJ

Names of the charity trustees who manage the charity:

- | | | |
|---|------------------------------|----------------------|
| 1 | Dr David Kenneth Hillebrandt | |
| 2 | Mrs Margaret Benjafield | Treasurer/ Secretary |
| 3 | Mrs Elizabeth Mary Curtis | |
| 4 | Mrs Pamela Jane Johns | |

There are no corporate charities or Trustees holding title to property belonging to the Charity.

Funds held as custodian trustees on behalf of others:

All items comprising the Museum's collections are held in trust for the benefit of the local community. Under the terms of the Constitution none of the items in the collections can be used as security for loans or mortgages. Safe custody is by means of physical security and a monitored alarm system.

The value of the collections does not form part of the Museum's balance sheet.

Additional information - The Trustees benefit from the guidance of a professional Mentor.

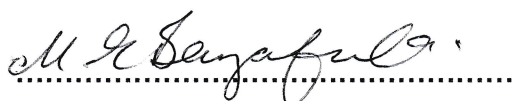
Exemptions from disclosure - None

Other optional information – None

Declarations

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

Signed on behalf of the charity's trustees



MRS MARGARET BENJAFIELD

TRUSTEE/SECRETARY

Date: 14/10/23

By a General Vesting Declaration dated 31 March 2021, the assets and liabilities of the unincorporated charity Holsworthy Museum Society were transferred to the CIO Holsworthy Museum on 1st January 2022