



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1st April 2024 Period start date

To 31st March 2025 Period end date

Charity name: Carisbrooke Castle Museum

Charity registration number: 1188568

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To promote the education of the public in the history of Carisbrooke Castle and the Isle of Wight by the provision of a museum for the maintenance and public exhibition of a collection of objects, artefacts, specimens, books and documents and picture and the extension, enhancement, conservation and maintenance of the collection.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<p>The main activities undertaken by the Trust in relation to the above purpose are:</p> <ul style="list-style-type: none">• Maintaining a museum relating to the history of the Isle of Wight and to Carisbrooke Castle• Collecting, documenting and preserving collections which support the Museum's mission• Using the collections in public exhibitions and in educational activities, and making them available for study and research.• Provide access to collections and associated information by other means including the internet and outreach activities• Undertaking fundraising activities which support and sustain the museum's operation
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	N/A
Policy on social investment including program related investment	Para 1.38	N/A
Contribution made by volunteers	Para 1.38	<p>The museum is open to the public 3 days a week between Mid-February and April, 7 days a week between April and November and 4 days between Christmas and New Year. During these periods volunteers are key to the day-to-day operation of the Museum as they cover the front of house function, meeting and greeting visitors, monitoring their movement around the museum and recording visitor numbers. They also provide access to museum activities such as children's museum activity trails.</p> <p>In addition, they provide support to talks and other events.</p> <p>Volunteers also assist the curatorial staff with the day-to-day management of the museum's collections</p>
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>The museum has had a stable year in 2024/25, as this was year 3 of a 3 year agreement with English Heritage for funding of the museum.</p> <p>Acquisitions:</p> <p>The Museum continues to accept donations of artefacts that fit our Collecting Policy. In 2024-2025 these included:</p> <ul style="list-style-type: none">• A collection of 19th century engravings of the Isle of Wight; a series of oral history interviews and digital images collected as part of Memorability Life Stories project;• an early 20th century silk wedding dress;• a collection of uniforms, accessories and documents collected over the course of a career working for the NHS on the Isle of Wight;• and 20 17th and 18th century books and pamphlets about the English Civil War and the imprisonment of King Charles I at Carisbrooke Castle.

		<p>Exhibitions: A display of a selection of engravings from the Brannon Collection took place at the end of 2024, followed by an exhibition of landscape photography titled “The Beauty of...”, showcasing the work of local photographer CJ Nox. Exhibitions in the museum continue to be updated and changed to display more objects from the museum’s collection.</p> <p>Funding: The Museum has continued to face financial pressures due in the main to the UK financial crisis and the decision of English Heritage not to uplift the grant value, which has remained the same since 2016. With the increases to the national living wage, the Museum found itself in a position where the funding from English Heritage is now not sufficient to cover the staff required to run the museum. The Trustees have worked hard to ensure sufficient funds have been available to support the museum operations.</p> <p>Work has been actively underway to explore new sources of funding including a small retail function, selling products produced by local artisans.</p> <p>Staff: Due to the challenging financial situation, the Museum continues to operate with a skeleton staff, with only one member of staff on site for 80% of the time. Our new manager has been in place for 12 months and has now established himself as a capable and flexible leader. In July 2024, the Curator left the Museum and the Assistant Curator was appointed as the Curator. The staff movements allowed reprofiling of the staff team, and a new assistant curator and administration officer have been appointed.</p> <p>Volunteers: The energy and commitment of the Museum volunteers has continued throughout 2024-2025 They continue to bring a great deal of skill, positivity and personality to the organisation. Volunteers have assisted with front of house, retail sales, out of hours events, talks and some have expanded their volunteering to include talks about the Museum and its history.</p> <p>Developments: The organisation has worked with English Heritage and other key partners to restore Beatrice’s Kitchen and this was completed in April 2024. The kitchen has been used for a range of events during the 2024/25 season</p>
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		<p>including a new young people's theatre group, Carisbrooke Cast, supported by the Tide Nor Time Players, who meet on a Friday evening.</p> <p>Users: There were 86,274 visitors to the museum during the period 1st April 2024 – 31st March 2025. This represented a 6% decrease on 2023/24. Visitor numbers remain below pre-pandemic levels. All visitors to the Castle have free access to the Museum's exhibitions during site opening hours.</p> <p>We secured a £30,000 grant from Arts Council England for our VE Day Oral History project, which began on 1st May 2025 and is now underway under the leadership of Lisa Kerley. This major project focuses on collecting and sharing personal stories from the Second World War, with a particular emphasis on local experiences and voices from the Isle of Wight. The work will significantly enhance both our historical content and our community engagement. With Lisa's guidance, we are carrying out in-depth research, capturing oral histories, and developing new interpretation for future displays and events. This project marks an important step forward in how we connect with our audiences and represent the Island's wartime past. More information on this project will be provided in the 2025-2026 annual report.</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	N/A
Performance of fundraising activities against objectives set	Para 1.41	N/A
Investment performance against objectives	Para 1.41	N/A
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	See accompanying information on pages
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The close down reserve is a contingency in the event that the close down of the organisation and disposal of its collection in line with national accreditation recommendations. This reserve is reviewed annually to ensure it reflects inflationary pressures and lessons learnt from previous difficult financial years.
Amount of reserves held	Para 1.22	The Trustees hold a close down reserve of circa £50K
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	N/A

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	English Heritage grant, other small grants, retail activity and donations
Investment policy and objectives including any social investment policy adopted	Para 1.46	The investment policy is being developed during 2025.
A description of the principal risks facing the charity	Para 1.46	The museum continues to work on the security of tenure in Carisbrooke Castle issue with English Heritage.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charitable Incorporated Organisation
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<p>Appointed Charity Trustees - Every trustee must 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 charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.</p> <p>Ex officio trustees - The Chair (or nominated representative) of Newport and Carisbrooke Parish Council and the Isle of Wight Council's Heritage portfolio holder for the time being ("the office holder") shall automatically ("ex officio") be a charity trustee, for as long as he or she holds that office.</p> <p>Nominated trustees - The Lord Lieutenant of the Isle of Wight and the active volunteer body of Carisbrooke Castle Museum CIO ("the appointing body") may appoint 1 charity trustee each. Any appointment must be made at a meeting held according to the ordinary practice of the governing body. Each appointment must be for a term of three years. A trustee appointed by the appointing body has the same duty under clause 9(1) as the other charity trustees to act in the way he or she decides in good faith would be most likely to further the purposes of the CIO.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<p>The charity trustees will make available to each new charity trustee, on or before his or her first appointment:</p> <p>(a) a copy of the current version of this constitution; and</p> <p>(b) a copy of the CIO's latest Trustees' Annual Report and statement of accounts.</p> <p>Other induction and training will be given once the Trustee has commenced their appointment.</p>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	N/A
Relationship with any related parties		N/A

	Para 1.51	
Other		

Reference and Administrative details

Charity name	Carisbrooke Castle Museum
Other name the charity uses	
Registered charity number	1188568
Charity's principal address	Castle Hill Newport Isle of Wight PO30 1XY

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	Gill Kennett MBE, DL	Co-opted Trustee Nominated Trustee	To 10/03/2025 From 10/03/2025	N/A HM Lord Lieutenant for the Isle of Wight
2	Gillian Burnett BEM	Co-opted Trustee		N/A
3	Anne Longford DL	Nominated Trustee	Resigned 10/03/2025	HM Lord Lieutenant for the Isle of Wight
4	Carol Alstrom	Chair Nominated Trustee		Volunteers Representative
5	Cllr Jonathan Bacon	Ex-officio Trustee		Isle of Wight Council
6	Rosemary Cooper	Co-opted Trustee	Resigned 09/12/2024	N/A
7	Peter Ednay	Co-opted Trustee		N/A
8	Gioia Minghella	Co-opted Trustee		N/A
9	Peter Whiteman	Co-opted Trustee	Resigned 10/03/2025	N/A
10	Matthew Price	Ex-officio Trustee		Newport and Carisbrooke Community Council
11	Phillip Shannon	Co-opted Trustee	From 10/06/2024	
12	James Mitchell	Co-opted Trustee	From 10/06/2024	
13				

Corporate trustees – names of the directors at the date the report was approved

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/A
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N/A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

Lee Donald – General Manager
Kate Tilley – Curator

Exemptions from disclosure

Reason for non-disclosure of key personnel details

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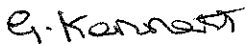
Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Carol Alstrom	Gill KENNET
Position (eg Secretary, Chair, etc)	Chair.	Trustee
Date	13.7.2025.	



Carisbrooke Castle Museum

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Receipts and payments accounts

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For the period from	Period start date	To	Period end date
	1.04.24		31.03.25

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations, Legacies & Grants	66,883	2,389	-	69,272	82,838
Members Subscriptions	346	-	-	346	650
Fees for Charitable Services	797	-	-	797	1,606
Trading Activities	5,476	-	-	5,476	3,287
Fundraising Events	4,842	-	-	4,842	2,014
Interest	1,398	-	-	1,398	1,310
Other Receipts (Reimbursements)	132	-	-	132	1,652
Sub total (Gross income for AR)	79,873	2,389	-	82,262	93,356
A2 Asset and investment sales, (see table).					
Receipts from Sale of Fixed Assets	-	-	-	-	-
Loans Received	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	79,873	2,389	-	82,262	90,102
A3 Payments					
Salaries & NI & Other Personnel Costs	55,483	-	-	55,483	54,679
Pension Contributions	1,971	-	-	1,971	2,532
Charitable Activities & Trading Costs	4,100	698	-	4,798	15,751
Cost of Fundraising	229	-	-	229	1,218
Repairs & Maintenance	74	-	-	74	19,292
Utilities	10,481	-	-	10,481	7,671
Equipment	722	-	-	722	714
Insurance / Prof Support Contracts	10,973	-	-	10,973	8,696
Office Overheads (Post, Phone, Stationery, IT etc.)	5,288	-	-	5,288	6,202
Bank Charges	609	-	-	609	173
VAT	-	-	-	-	-
Sub total	89,930	698	-	90,628	116,927
A4 Asset and investment purchases, (see table)					
Purchase of Fixed Assets	-	-	-	-	-
Loans Repaid	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	89,930	698	-	90,628	116,927
Net of receipts/(payments)	- 10,057	1,691	-	- 8,366	- 23,572
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	84,964	108,536
Cash funds this year end	- 10,057	1,691	-	76,598	84,964

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	<div>Current Account</div> <div>Reserve Account</div> <div>No 2 Account</div> <div>Paypal</div> <div> Total cash funds (agree balances with receipts and payments account(s)) </div>	<div>5,809.15</div> <div>75,419.91</div> <div>269.51</div> <div>81,499</div> <div>OK</div>	<div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>OK</div>	<div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>OK</div>
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
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 asset belongs	Cost (optional)	Current value (optional)
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
Signed by one or two trustees on behalf of all the trustees		Signature	Print Name	Date of approval

CARISBROOKE CASTLE MUSEUM

INDEPENDENT EXAMINATION OF ACCOUNTS

INTRODUCTION

I have been requested to undertake an independent examination of the accounts of Carisbrooke Castle Museum for the financial year ending 31st March 2025. The Museum is a Registered Charity (No. 1188568) with an annual turnover between £10,000 and £250,000 and an independent examination report is therefore a Charity Commission requirement together with the submission of annual accounts. I confirm that I have no other role or relationship with the Charity or its Trustee's and there are no circumstances in the examiner's judgement that would reasonably lead to the perception that the examiner is not independent

To assist my examination I have been provided with a detailed Excel spreadsheet containing all relevant accounting records, together with associated bank statements and copies of a sample of invoices contained in the expenditure payments list.

SCOPE OF EXAMINATION

The examination of accounts has included the following actions –

1. Checking the consistency of records contained on the Excel spreadsheet, that detailed expenditure and income statements reconcile with the accounts summary and the prepared report for the Charity Commission.
2. Reconciliation of accounting records to bank statements. A monthly bank reconciliation was undertaken during the year. The bank statements as at 31st March 2025 were inspected and agreed to the annual accounts statement.
3. A sample of invoices was taken from the expenditure listing and received electronically. All invoices inspected were accounted for correctly and supported the financial statements.
4. The accounting records provide for a process of budgetary control, and identify variances on budget heads.
5. PAYE Basic Tools from HMRC is used to make payments to HMRC which are paid on a monthly basis. Evidence of submission to HMRC were obtained and agreed.

3. CONCLUSION

Having regard to the above, no matters have come to my attention that

need further reporting and in my opinion the accounts comply with the requirements of the Charity Commission.

Gareth Hughes

GARETH HUGHES BA (Hon) Former CPFA.

17TH MAY 2025