



THE FRIENDS OF PENLEE HOUSE GALLERY AND MUSEUM
Charity no 1206841
ANNUAL REPORT OF THE BOARD OF TRUSTEES 2 FEBURARY 2024 -31 March 2025

The Charity was registered on 2 February 2024 and is the successor Charitable Incorporated Organisation to the unincorporated Charity of the same name (Charity no 1001644).

The predecessor Charity delivered all activities up to 31 March 2025, the date of transfer of its assets to this charity. Memberships were also transferred on that date. Prior to 31 March, the work of the Trustees related to governance matters as described below.

The Trustees of both Charities held 7 joint meetings during the period covered by this report. Where decisions pertained to one of the Charities, they have been made by those who are trustees of that Charity and minuted accordingly.

Governance

A register of Trustees' interests has been established for this Charity and protocols for appointing trustees are in place. We have agreed a statement of Financial Controls and Procedures; set up a Risk Register; and updated the Data Protection Policy. We have also agreed a Bullying and Harassment Policy. Including the policies taken over from the predecessor Charity, we have policies covering all relevant recommendations of the Charity Commission. The Trustees carried out a skills audit in early 2025 and will use this to identify skills gaps and seek to recruit accordingly. We use a regularly updated action plan to coordinate work and keep progress on our priorities in mind.

Preparation for the 2025/6 Accounting Year

During this period, the Trustees agreed the Charity's budget and financial statement for the 2025/6 accounting year. They agreed on developments in the activities of the Charity which will be reported fully at the end of the next accounting year (31 March 2025). These include the introduction of a 'Benefactors' scheme and a campaign to increase legacy-giving. The Trustees will continue the portfolio of activities of the predecessor Charity. The Trustees will continue their relationship with Penzance Council through the Penlee House Partnership.

We wish to thank the Town Council and staff at Penlee House for their support: Anna Renton, Director; Verity Anthony, Director – maternity cover; Katie Herbert,

Curator/Deputy Director; Sandra Paternotte, Administrator; and Maisy-Sky Lumbers, Marketing Assistant; James Hardy, Penzance Town Clerk. We thank our President and Vice-Presidents for their continuing support.

Officers, and Trustees 2 February – 31 March 2025

President: Dr Kurt Jackson

Vice-Presidents: Lawrence Hendra; Petroc Trelawney

Trustees

John Swarbrooke, Chair; Jon Symons, Vice Chair; Ruth Towse, Vice-Chair; Peter Maynard, Hon Treasurer; Judith Summers, Hon Secretary; Stuart Carter; William Godwin (from 26 March 2025); Ann Morris; Caroline White.

Approved by the Board of Trustees 26 November 2025



CHARITY COMMISSION
FOR ENGLAND AND WALES

inactive in this financial period. All funds were held by the predecessor charity, transfer of assets occurring on 31 March 2025

The Friends of Penlee House Gallery and Museum

No (if any)

Receipts and payments accounts

CC16a

For the period
from

Period start date
02/02/2024

To

Period end date
31/03/2025

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					
No receipts	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	-	-	-	-	-
A2 Asset and investment sales, (see table).					
No transactions	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	-	-	-	-	-
A3 Payments					
No payments	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
A4 Asset and investment purchases, (see table)					
No purchases	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	-	-	-	-	-
Net of receipts/(payments)	-	-	-	-	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	-	-	-	-	-

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	None	-	-	-
		-	-	-
		-	-	-
	Total cash funds	-	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	None	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	None		-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	None		-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	None		-	
			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	