



Trustees' Annual Report for the period

From 6 April 2020
5 April 2021

Period start date To
Period end date

Charity name: **Bruton Museum Society**

Charity registration number: **1008144**

Objectives and Activities

Summary of the purposes of the charity as set out in its governing document	SORP reference Para 1.17	Town's story using artefacts of, about or from Bruton. Geology & fossils, flooding, Roman temple, Saxons, early 9thC church to 16C, Augustinian Abbey. Links to Jamestown/Williamsburg, USA. Industries: silk, wool, transport, education, farming. Famous residents: 16/17thC benefactor Hugh Sexey, author John Steinbeck, sculptor Ernst Blensdorf. Parish registers 450 years digitised. Local art, private collections.
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	During this period the museum was mainly closed due to COVID restrictions
Statement confirming whether the trustees have had regard to the guidance	Para 1.18	We confirm the trustees have had regard to the guidance issued by the Charity Commission on public benefit.

issued by the Charity Commission on public benefit		
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Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	The charity does not make grants.
Policy on social investment including program related investment	Para 1.38	None
Contribution made by volunteers	Para 1.38	The charity is reliant on numerous volunteers for its day to day running.
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	The museum continues to tell the story of the town and provide an exhibition space for local artists and crafts people.

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	Fund raising has been sufficient to enable the charity to undertake its objectives.
Investment performance against objectives	Para 1.41	The charity has no investments.
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	At the end of the period the charity had unrestricted funds of £27,424.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Sufficient funds are held to enable the museum to cover day to day running costs, maintain the fabric of the building and ensure the safe preservation of the collection.
Amount of reserves held	Para 1.22	£27,424 unrestricted, £2,398 restricted
Reasons for holding zero reserves	Para 1.22	N/a
Details of fund materially in deficit	Para 1.24	None
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	The trustees do not consider there are any uncertainties at the present time about the charity as a going concern.

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	Private donors and donations from visitors to the museum. Other grants, in particular COVID support grants in the year in question.
Investment policy and objectives including any social investment policy adopted	Para 1.46	None
A description of the principal risks facing the charity	Para 1.46	Financial risk if we are not able to raise the funds to meet the running costs. Risk of physical damage to the collection.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Trust deed
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Unincorporated association
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	Standard fit and proper tests as per Charity Commission eligibility criteria, plus willingness to sit on the board.

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	Make them aware of the role of trustees, other training depends on the individual.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	N/a
Relationship with any related parties	Para 1.51	None
Other		

Reference and Administrative details

Charity name	Bruton Museum Society
Other name the charity uses	
Registered charity number	1008144

Charity's principal address	Palan House Quaperlake Street Bruton BA10 0HQ

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	Edward Godfrey OBE			
2	Elisabeth Balfour			
3	Sas Wright	Vice-Chair		
4	James Coward	Treasurer		
5	Andrew Leach			
6	Ed Tickner			
7	Andrew Pickering	Chair		
8	Angela Pearce			
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Corporate trustees - names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	None held
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

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)

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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)

	
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Full name(s)

James Coward	
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Position (eg
Secretary, Chair, etc)

Treasurer	
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Date

7 March 2023

Bruton Museum Society

Receipts and payments account for the year ended 5 April 2021

	2021	2020
Receipts		
Donations:		
individuals and museum collection box	2,300	6,115
Gift aid relief	1,781	1,421
Fundraising		913
Sales	1,129	301
Town council grant		1,000
Other grants:		
Bristol CC		200
COVID support	23,738	
Rental income		114
Subscriptions	<u>1,128</u>	<u>1,292</u>
Total receipts	30,076	11,356
Payments		
Administration	952	856
Curator's fees and expenses	1,058	
Fundraising		365
Cost of sales	18	92
Electricity	393	2,814
Premises	6,620	9,465
Stewarding		109
Display costs	342	523
	<u>9,383</u>	<u>14,224</u>
Net movement for year	<u>20,693</u>	<u>-2,868</u>
Cash in bank and in hand as at 5 April		
Unrestricted funds	27,424	7,474
Restricted funds (oral history)	<u>2,398</u>	<u>2,398</u>
Total	<u>29,822</u>	<u>9,872</u>



Section A

Independent Examiner's Report

Report to the trustees

Charity Name Bruton Museum Society

On accounts for the year ended

5 April 2021	Charity no (if any) 1008144
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Set out on pages

(remember: to include the page numbers of additional sheets)
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I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended DD / MM / YYYY.

Responsibilities and basis of report

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

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

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.

* Please delete the words in the brackets if they do not apply.

Signed:

Judith Tuck

Date:

17/3/23

Name:

JUDITH TUCK

Relevant professional qualification(s) or body

AAT