CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1st April 2025 Period start date
To 31st March 2026 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	The main activities undertaken by the Trust in relation to the above purpose are: • 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	The museum is open to the public 7 days a week between April and November. During November to April it is open every weekend, the period between Christmas and New Year and February half term. From February half term the Museum is open Wed-Sun until full 7 day operating starts in April. 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. In addition, they provide support to talks and other events. Front of house volunteers also support a small shop selling locally produced crafts. Volunteers also assist the curatorial staff with the day-to-day management of the museum's collections.
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 has had a stable year in 2025/26, as this was year 1 of a 2 year agreement with English Heritage for funding of the museum. **Acquisitions:** The Museum continues to accept donations of artefacts that fit our Collecting Policy. In 2025-26 these included: a collection of documents and photographs from the family of Charles Wilfred Brannon, a collections of photographs, documents and objects relating to the life and family of Ernest Fry, a framed sand picture of the donkey wheel at Carisbrooke Castle by Nigh, a series of oral history interviews and digital images collected as part of the Out on an Island project in 2025, a family bible bound by George Herny Dunford of Newport, minute books and additional objects relating to the IW coursing club, a WWII scaffold cliff from Woody Bay, St Lawrence, a National Registration ID card WWII, a nurses cape worn at Ventnor Hospital, a series of oral history interviews and digital images collected as part of the VE 80; Unlocking Stories of 1945 and newspaper cutting and photographs from the sale of Jolliffe's shoe shop in Cowes in the 1980s**.** **Exhibitions:** A grant funded display of historic costume was established in February 2026. This exhibition will be updated and changed on a regular basis so a greater portion of the museum's costume collection can be shared with museum visitors. A second installation of the exhibition of landscape photography titled "The Beauty of…", showcasing the work of local photographer CJ Nox was installed in spring 2026. Exhibitions in the museum continue to be updated and changed to display more objects from the museum's collection. **Funding:** The Museum has continued to face financial pressures due in the main to the ongoing challenges to the UK financial position and reductions in tourism. With the increases to wages, 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. Work has been actively underway to explore new sources of funding expanding on the small retail function, selling products produced by

		local artisans. Work has also been undertaken by the staff team and trustees to source grant funding with a core grant being secured from the Garfield Weston Foundation. **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 staff team has stabilized and the team are working well together to support the museum. The team are keen and willing to develop and have undertaken a number of personal development opportunities to support the museum. These include care of the collection, bid writing and other activities to support day to day operations. **Volunteers:** The energy and commitment of the Museum volunteers has continued throughout 2025/26 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. We are putting plans in place to work more closely with English Heritage, with new volunteers being recruited to work in the wider castle as well as the museum. **Developments:** Work is underway with English Heritage to work together to deliver a unified experience for visitors to the Castle. This work includes sharing the volunteer workforce, working together on events **Users:** There were 85,272 visitors to the museum during the period 1st April 2025 – 31st March 2026. This represented a 1.2% decrease on 2024/25 and is a slow down on the 6% reduction seen in 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. The VE Day grant supported focused oral history and commemorative work with local residents, enabling the collection of first-hand and family wartime memories from the Second World War. This resulted in a series of recorded oral history interviews and facilitated reminiscence sessions, which were added to our archive and used to strengthen interpretation of local wartime experience.

		The activity provided structured opportunities for older residents to share memories in a supported environment, many of which had not been formally recorded before, ensuring these accounts are preserved for future generations. It also contributed to intergenerational understanding by connecting personal testimony with public remembrance activity and community reflection. The material gathered directly informed our wider engagement programme and will continue to be used in learning and interpretive activity, ensuring that local voices remain central to how VE Day and wartime history are represented and understood within the community.

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		During July 2025 the Museum was notified that it needed to commence the re-accreditation process. The Chair of Trustees, supported by two other trustees worked with the Museum Manager and Curator to ensure the necessary documentation was in place to meet the requirements. This included updating the forward plan and reviewing museum systems and processes to ensure they met the required standards. The re-accreditation documentation was submitted at the end of January 2026 and the outcome of the assessment should be known later in 2026.

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 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	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	

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, Garfield Weston Foundation, Arts Council and donations
Investment policy and objectives including any social investment policy adopted	Para 1.46	
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. It is anticipated that this will be resolved by April 2027.
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	**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. 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. **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. **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.

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	The charity trustees will make available to each new charity trustee, on or before his or her first appointment: (a) a copy of the current version of this constitution; and (b) a copy of the CIO's latest Trustees' Annual Report and statement of accounts. Other induction and training will be given once the Trustee has commenced their appointment.
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	Nominated Trustee		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
7	Peter Ednay	Co-opted Trustee		N/A
8	Gioia Minghella	Co-opted Trustee		N/A
10	Matthew Price	Ex-officio Trustee		Newport and Carisbrooke Community Council
11	Phillip Shannon	Co-opted Trustee		N/A
12	James Mitchell	Co-opted Trustee		N/A
13	Mark Tidy	Co-opted Trustee		N/A
	Tracy Bull	Co-opted Trustee		N/A

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	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

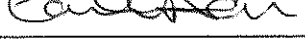
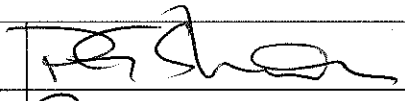
Reason for non-disclosure of key personnel details

Other optional information

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	PHILIP SHANNON
Position (eg Secretary Chair, etc)	Chair of Trustees	Trustee.

Date 07/09/2026



Carisbrooke Castle Museum	1188568

Receipts and payments accounts

CC16a

For the period from	Period start date 01.04.25	To	Period end date 31.03.26

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	72,918	31,600	-	104,518	69,272
Members Subscriptions	847	-	-	847	346
Fees for Charitable Services	290	-	-	290	797
Trading Activities	13,109	-	-	13,109	5,476
Fundraising Events	2,250	-	-	2,250	4,842
Interest	905	-	-	905	1,398
Other Receipts (Reimbursements)	-			-	132
***Sub total** (Gross income for AR)*	90,319	31,600	-	121,919	82,262
A2 Asset and investment sales, (see table).					
Receipts from Sale of Fixed Assets	-	-	-	-	
Loans Received	-				
Sub total	-	-	-	-	-
Total receipts	90,319	31,600	-	121,919	82,262
A3 Payments					
Salaries & NI & Other Personnel Costs	59,349	-	-	59,349	55,483
Pension Contributions	1,907	-	-	1,907	1,971
Charitable Activities & Trading Costs	10,736	31,257		41,993	4,798
Cost of Fundraising	180			180	229
Repairs & Maintenance	592	-	-	592	74
Utilities	7,035	-	-	7,035	10,481
Equipment	714	-	-	714	722
Insurance / Prof Support Contracts	8,345	-	-	8,345	10,973
Office Overheads (Post, Phone, Stationery , IT etc.)	5,376			5,376	5,288
Bank Charges	550			550	609
VAT		-	-	-	-
Sub total	94,783	31,257	-	126,040	90,628
A4 Asset and investment purchases, (see table)					
Purchase of Fixed Assets	-	-	-	-	-
Loans Repaid	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	94,783	31,257	-	126,040	90,628
Net of receipts/(payments)	- 4,464	343	-	- 4,121	8,366
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end			-	81,499	76,598
Cash funds this year end	- 4,464	343	-	77,378	84,964

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted to nearest £	Restricted to nearest £	Endowment to nearest £
B1 Cash funds	Current Account	1,047.29	-	-
	Reserve Account	74,987.57	343	-
	No 2 Account	1,000.00		
	Paypal		-	-
	Total cash funds	77,035	343	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	Cash on site	-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
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 liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

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 2026. 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 and this is considered good practice. The bank statements as at 31st March 2026 were inspected and agreed to the annual accounts statement.
3. A sample of invoices was taken from the expenditure listing and all invoices inspected were accounted for correctly.
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.

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 CPFA 10TH MAY 2026