

**THE CHARLES DARWIN TRUST**

**ANNUAL REPORT AND ACCOUNTS**

**FOR THE YEAR ENDED**

**31<sup>st</sup> DECEMBER 2022**

**Company Registration No: 03694613**

**Charity Registration No: 1074914**

**THE CHARLES DARWIN TRUST**  
**REPORT OF THE TRUSTEES**  
**FOR THE YEAR ENDED 31<sup>ST</sup> DECEMBER 2022**

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**FOR THE YEAR ENDED 31<sup>ST</sup> DECEMBER 2022**

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# THE CHARLES DARWIN TRUST

## REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31<sup>ST</sup> DECEMBER 2022

### LEGAL AND ADMINISTRATIVE DETAILS

**TRUSTEES**

Randal Keynes OBE FLS (Chair) \*  
Dr Claire Barlow \*  
Karen Goldie-Morrison FLS (Treasurer)  
Professor James Costa FLS  
Emma Newall  
Revd Professor Michael J Reiss  
Sarah Darwin\*

\* Darwin family

**REGISTERED OFFICE**

31 Baalbec Road,  
London,  
N5 1QN

**REGISTERED COMPANY NUMBER**

03694613 (England and Wales)

**REGISTERED CHARITY NUMBER**

1074914

**ACCOUNTANTS**

Knox Cropper LLP  
65 Leadenhall Street  
London  
EC3A 2AD

**BANKERS**

CAF Bank

# THE CHARLES DARWIN TRUST

## REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31<sup>ST</sup> DECEMBER 2022

The Trustees, who are also directors of the charity for the purposes of the Companies Act 2006, present their combined Directors' report and Trustees' annual report with the financial statements of the charity for the year ended 31 December 2022. The Trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

### **OBJECTS AND ACTIVITIES**

The Trust was established to develop the use of the heritage of Charles Darwin the scientist, his scientific work and his life with his family and friends as an inspiration for learning about science and the natural world.

The objects of the Charity when it was launched in 1999 were the advancement of education in the United Kingdom and elsewhere in relation to:

- the life and work of Charles Darwin
- the development and understanding of natural history and the life sciences with particular reference to Darwin's home at Down House and to any associated institutions in the village of Downe in Kent, and
- the advancement of education and such other purposes for the benefit of the community as shall be exclusively charitable.

The aims of the Charity are:

- to use Darwin-Inspired Learning to promote excellence in science education
- to promote an understanding of the natural world to ensure the survival of biodiversity and life on earth
- to enhance the understanding of Darwin's historical and contemporary significance
- to improve and extend science literacy and the understanding of science.

The Trust has based its materials for teaching and its Continuing Professional Development (CPD) courses for teachers on research into Darwin's own writings and those of his contemporaries and collaborators and on current scholarship. Taking as its context Darwin's life, work and influence, the Trust has developed an approach to teaching and learning in science which it offers for use by educators as Darwin-Inspired Learning.

### **DARWIN-INSPIRED LEARNING**

Darwin-Inspired Learning:

- encourages a sense of place and direct engagement with the natural world, such as the environments of Downe and other locations where Darwin worked, or through employing local environments which are accessible to students and their teachers.
- places importance on:
  - active learning through experiences and questions, solving problems, and dialogue between teachers and pupils, and between pupils themselves
  - teaching that engages critical and creative thinking about how scientists' work encourages interdisciplinary studies, with Darwin as the context, between science and literature, writing and expression, history, religious studies, geography, horticulture, dance and drama, design and technology, numeracy, music and art.

## THE CHARLES DARWIN TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31<sup>ST</sup> DECEMBER 2022

This is achieved through:

- using Darwin's ways of working and investigating
- using Darwin's theories about how nature works
- understanding how science and scientists use Darwin's ideas in their work today
- using stories about Darwin, the places where he worked and the things that he studied
- working with expert groups in the arts and humanities.

This approach is aimed at developing:

- young people who are engaged with the natural world as critical, imaginative investigators, who find science exciting, who have the ability to communicate their findings to others and who want to continue their studies
- teachers inspired by Darwin-Inspired Learning to become more effective and reflective
- a new generation of teachers and young people who are proud of the heritage that Charles Darwin gave to the world and understand its significance.

The Trustees have sought to develop resources that meet the requirements of the UK national curriculum, GCSE and post-16 courses. Many examination specifications expect pupils to carry out independent studies for which they have to collect and analyse data. Studying the natural world out-of-doors over a prolonged period and in great breadth and depth, allows students the opportunity to investigate and bring together data just as Charles Darwin did. However, fieldwork has greatly declined in recent years and teacher expertise to scaffold these activities has waned.

The Trustees believe in particular that teachers need support in developing their:

- teaching approaches for outdoor learning
- biological subject knowledge
- enthusiasm for the study of nature.

# THE CHARLES DARWIN TRUST

## REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31<sup>ST</sup> DECEMBER 2022

### ACHIEVEMENT AND PERFORMANCE

#### ACTIVITIES IN 2022

The Trust has continued its support for English Heritage projects at Down House with uses for education about Darwin's science; its discussions with the Linnean Society about educational uses of their Darwin and Alfred Russel Wallace Collections; and its help for schools developing 'Darwin Gardens' on their premises, using ideas set out in its book *Darwin-Inspired Learning* published in 2015, and in Professor Costa's book *Darwin's Backyard* published in 2017.

In 2022 Professor Costa completed copyediting and page proof review for two book manuscripts, *Radical by Nature: The Revolutionary Life of Alfred Russel Wallace* (published in 2023 by Princeton University Press) and *Darwin and the Art of Botany* (co-authored with botanical artist Bobbi Angell and in collaboration with the Oak Spring Garden Foundation, forthcoming in 2023). He also co-authored two academic papers published in 2022 (*Oikos* 2022:e09315 and *Ecological Entomology* 47(5): 749–757), contributed the Foreword to a forthcoming entomological monograph, and continued progress on his co-authored annotated edition of Darwin's *The Descent of Man* (also to be published by Princeton University Press).

Professor Costa was a National Science Foundation Distinguished Lecturer for Darwin Day 2022, delivering a presentation entitled "Patience, Industry, and a Fair Share of Invention: Lessons from Charles Darwin the 'Experimentiser' ", and read an academic paper at the November 2022 History of Science Society annual meeting in Chicago, Illinois ("Wallace and Darwin on human evolution: Competing visions of race and gender and their influence on science and society"). He also delivered invited presentations on Charles Darwin's thought and working method to audiences in the US and UK, including the Cowee School (Franklin, NC, USA) and King Edward's School (Birmingham, UK). Finally, in 2022 Professor Costa completed the "Darwin Experiments Compilation Cataloguing Project," with the assistance of the Trust.

Dr Newall has now published an article, with Professor Michael Reiss: (2023) Evolution hesitancy: Challenges and a way forward for teachers and teacher educators. *Evolution: Education and Outreach*, 16(5), 1-17. <https://doi.org/10.1186/s12052-023-00183-9>.

### PUBLIC BENEFIT STATEMENT

The Trustees confirm that they have complied with the duty set out under section 17 of the Charities Act 2011 and have paid due regard to the Charity Commission's guidance on public benefit, 'Charities and Public Benefit', in developing the Trust's objectives for the year and in planning its activities.

### FINANCIAL REVIEW

#### Reserves policy

The Trust maintains its reserves under two categories: (a) unrestricted (general) reserves, which are available for general use in pursuance of the charity's objectives, and (b) restricted reserves, which are for specifically earmarked purposes. Unrestricted reserves currently amount to £129,596.

The Trustees review the Charity's reserves policy on a regular basis and no less than annually. The reserves position is reported at every board meeting.

## **THE CHARLES DARWIN TRUST**

### **REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31<sup>ST</sup> DECEMBER 2022**

#### **Financial performance**

The total income received in the year was £481 (2021: £13). Expenditure for the year totalled £4,121 (2021: £6,011).

Overall, the Trust has recorded a deficit in 2022 of £3,640 compared to a deficit in 2021 of £5,998.

Funds brought forward from the previous year amounted to £133,236 and funds carried forward into 2023 amounted to £129,596, made up of £129,596 of unrestricted funds and £0.00 restricted.

#### **TRUST STRUCTURE, GOVERNANCE AND MANAGEMENT**

##### **Governing document**

The Company was incorporated on 13<sup>th</sup> January 1999 in England and Wales as a company limited by guarantee under the Companies Acts (Registration No. 3694613).

The Company has charitable status and is registered with the Charity Commission as Charity No. 1074914. It is potentially exempt from Corporation Tax under Chapter 3 of Part 11 of the Corporation Taxes Act 2010. The Company is known as The Charles Darwin Trust and its Directors are its Trustees.

##### **Organisational structure**

The day-to-day management of the Trust is led by Randal Keynes reporting to the trustees.

Professor David Kohn is the Trust's Honorary Senior Research Fellow.

##### **Risk management**

The Trustees have reviewed the key risks to which the Trust is exposed, and actions have been taken to mitigate those risks.

The Trust has no operational hub. All trustees and the freelance bookkeeper work from their homes. The funds of the trust amply cover the costs going forward.

## THE CHARLES DARWIN TRUST

### REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31<sup>ST</sup> DECEMBER 2022

#### STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees (who are also the directors of the Charles Darwin Trust for the purposes of company law) are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice), including Financial Reporting Standard 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland".

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing those financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently
- observe the methods and principles in the Charity SORP
- make judgements and estimates that are reasonable and prudent
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The Trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- there is no relevant information of which the charitable company's examiners' are unaware; and
- the Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant information and to establish that the examiners are aware of that information.

This report has been prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small companies.

Approved by order of the Board of Trustees on 23 August 2023 and signed on its behalf by:

  
\_\_\_\_\_

Professor Michael Reiss (Acting Chairman)



**THE CHARLES DARWIN TRUST**

**STATEMENT OF FINANCIAL ACTIVITIES**  
**(INCORPORATING THE INCOME AND EXPENDITURE ACCOUNT)**  
**FOR THE YEAR ENDED 31<sup>st</sup> DECEMBER 2022**

Notes	Un- restricted Funds £	Restricted Funds £	2022 Total £	<i>Un- restricted Funds</i> £	<i>Restricted Funds</i> £	<i>2021 Total</i> £
<b>INCOMING RESOURCES</b>						
Grants and donations	-	-	-	-	-	-
Investment Income	481	-	481	13	-	13
<b>TOTAL INCOMING RESOURCES</b>	<b>481</b>	<b>-</b>	<b>481</b>	<b>13</b>	<b>-</b>	<b>13</b>
<b>RESOURCES EXPENDED</b>						
Charitable Activities	2					
Education Activities	4,121		4,121	6,011	-	6,011
Wallace Correspondence Project	-	-	-	-	-	-
<b>TOTAL RESOURCES EXPENDED</b>	<b>4,121</b>	<b>-</b>	<b>4,121</b>	<b>6,011</b>	<b>-</b>	<b>6,011</b>
<b>NET INCOME/(EXPENDITURE) FOR THE YEAR BEFORE TRANSFERS</b>	<b>(3,640)</b>	<b>-</b>	<b>(3,640)</b>	<b>(5,998)</b>	<b>-</b>	<b>(5,998)</b>
<b>TRANSFERS BETWEEN FUNDS</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>FUND BALANCES BROUGHT FORWARD</b>	<b>133,236</b>	<b>-</b>	<b>133,236</b>	<b>139,234</b>	<b>-</b>	<b>139,234</b>
<b>FUND BALANCES CARRIED FORWARD</b>	<b>129,596</b>	<b>-</b>	<b>129,596</b>	<b>133,236</b>	<b>-</b>	<b>133,236</b>

All income and expenditure derive from continuing activities.

# THE CHARLES DARWIN TRUST

## BALANCE SHEET AS AT 31<sup>ST</sup> DECEMBER 2022

	Notes	2022		2021	
		£	£	£	£
<b>FIXED ASSETS</b>	5		-		-
<b>CURRENT ASSETS</b>					
Debtors		-		-	
Bank Balances		130,954		134,436	
		<u>130,954</u>		<u>134,436</u>	
<b>CREDITORS: Amounts falling due within one year</b>	6	<u>(1,358)</u>		<u>(1,200)</u>	
<b>NET CURRENT ASSETS</b>			129,596		133,236
<b>NET ASSETS</b>			<u>129,596</u>		<u>133,236</u>
<b>FUNDS</b>					
Restricted Funds			-		-
Unrestricted General Fund			129,596		133,236
			<u>129,596</u>		<u>133,236</u>

The Company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 December 2022.

The members have not required the Company to obtain an audit of its financial statements for the year ended 31 December 2022 in accordance with Section 476 of the Companies Act 2006.

The Directors acknowledge their responsibilities for:

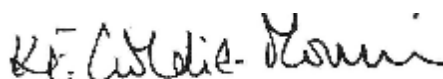
- (a) ensuring that the Company keeps accounting records which comply with Sections 386 and 387 of the Companies Act 2006 and
- (b) preparing financial statements which give a true and fair view of the state of affairs of the Company as at the end of each financial year and of its profit or loss for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the Company.

The financial statements have been prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small companies.

Approved by the Directors on 23 August 2023



\_\_\_\_\_  
Professor Michael Reiss (Acting Chairman)



\_\_\_\_\_  
Karen Goldie-Morrison (Treasurer)

**THE CHARLES DARWIN TRUST**  
**NOTES TO THE ACCOUNTS**  
**FOR THE YEAR ENDED 31<sup>st</sup> DECEMBER 2022**

1. **ACCOUNTING POLICIES**

a) *Basis of preparation of financial statements*

The financial statements of the charity, which is a public benefit entity under FRS102, have been prepared under the historical cost convention. They have been prepared in accordance with applicable United Kingdom accounting standards, the requirements of the Statement of Recommended Practice 'Accounting and Reporting by Charities' (SORP 2019), in accordance with the Financial Reporting Standard applicable in the UK (FRS 102) applicable to smaller entities and the Charities Act 2011. The presentational currency of the financial statements is Pound Sterling.

b) *Fund accounting*

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objects of the Charity and which have not been designated for other purpose.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors which have been raised by the Charity for particular purposes. The cost of administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

- c) Tangible fixed assets are stated at cost less depreciation. Depreciation is provided at rates calculated to write off the cost, less estimated residual value, over their expected useful life.
- d) All income resources are included in the Statement of Financial Activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received. For donations and grants to be recognised, the charity will have been notified of the amounts and the settlement in writing.
- e) All expenditure is accounted for on an accrual basis and has been included under expense categories that aggregate all costs for allocation to activities. Expenditure is recognised where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably.
- f) The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for 12 months from authorising these financial statements. The budgeted income and expenditure is sufficient with the level of reserves for the charity to be able to continue as a going concern.
- g) Judgements and key sources of estimation uncertainty are detailed in the above accounting policies, where applicable.

**THE CHARLES DARWIN TRUST**

**NOTES TO THE ACCOUNTS (CONT.)**  
**FOR THE YEAR ENDED 31<sup>st</sup> DECEMBER 2022**

**2. CHARITABLE ACTIVITIES**

	2022	2021
	£	£
<b>Education Activities</b>		
Staff costs	-	1,484
Legal and Professional fees	-	60
Office costs	-	(9)
Grants and donations	-	1,393
Support costs (Note 3)	4,121	3,083
	4,121	6,011

**3. SUPPORT COSTS**

	2022	2021
	£	£
Independent examiners fee	1,200	1,200
NR OH fees	550	912
Office Costs	719	229
Other Costs	118	742
Travel	1,534	-
	4,121	3,083

**4. SALARY COSTS**

	2022	2021
	£	£
Gross Salary Costs	-	189
Social Security Costs	-	1,205
Employers Pension Costs	-	90
	-	1,484

The average monthly number of employees during the year was as follows:

	2022	2021
	£	£
Average number of employees	-	1

There were no employees whose employee benefits exceeded £60,000.

The Key Management Personnel of the Charity are those persons having authority and responsibility for planning, directing and controlling the activities of the Charity. Total employee benefits, including employer pension contribution and employer social security costs for key management personnel in the period amounted to £0 (2021: £1,484).

**THE CHARLES DARWIN TRUST**

**NOTES TO THE ACCOUNTS (CONT.)**  
**FOR THE YEAR ENDED 31<sup>st</sup> DECEMBER 2022**

5. **FIXED ASSETS**

	2022	2021
	£	£
<b>Cost</b>		
Balance at 1 <sup>st</sup> January 2022	13,657	13,657
Acquisitions	-	-
Disposals	-	-
Balance at 31 <sup>st</sup> December 2022	<u>13,657</u>	<u>13,657</u>
<b>Depreciation</b>		
Balance at 1 <sup>st</sup> January 2022	13,657	12,466
Charge during year	-	1,191
Balance at 31 <sup>st</sup> December 2022	<u>13,657</u>	<u>13,657</u>
<b>Net Book Value</b>		
At 31 <sup>st</sup> December 2022	<u>-</u>	<u>-</u>

6. **CREDITORS**

**Amounts falling due within one year**

	2022	2021
	£	£
Accruals	1,200	1,200
Other creditors	158	-
	<u>1,358</u>	<u>1,200</u>

7. **DIRECTORS' EXPENSES**

No expenses were charged by the directors during the year (2021: Nil).

**THE CHARLES DARWIN TRUST**

**NOTES TO THE ACCOUNTS (CONT.)**  
**FOR THE YEAR ENDED 31<sup>st</sup> DECEMBER 2022**

8. MOVEMENT IN FUNDS

	At 1 Jan 2022	Income	Expenditure	Transfers	At 31 Dec 2022
	£	£	£	£	£
Unrestricted funds	133,236	481	(4,121)	-	129,596
Restricted funds					
Wallace Project	-	-	-	-	-
	<u>£133,236</u>	<u>481</u>	<u>(4,121)</u>	<u>-</u>	<u>129,596</u>

MOVEMENT IN FUNDS - Comparative

	At 1 Jan 2021	Income	Expenditure	Transfers	At 31 Dec 2021
	£	£	£	£	£
Unrestricted funds	139,234	13	(6,011)	-	133,236
Restricted funds					
Wallace Project	-	-	-	-	-
	<u>139,234</u>	<u>13</u>	<u>(6,011)</u>	<u>-</u>	<u>133,236</u>

9. ANALYSIS OF NET ASSETS at 31<sup>st</sup> December 2022

	Unrestricted fund	Restricted fund	Total 2022
	£	£	£
Fixed assets	-	-	-
Current assets	130,954	-	130,954
Current liabilities	(1,358)	-	(1,358)
	<u>129,596</u>	<u>-</u>	<u>129,596</u>

ANALYSIS OF NET ASSETS at 31<sup>st</sup> December 2021

	Unrestricted fund	Restricted fund	Total 2021
	£	£	£
Fixed assets	-	-	-
Current assets	134,436	-	134,436
Current liabilities	(1,200)	-	(1,200)
	<u>133,236</u>	<u>-</u>	<u>133,236</u>

**THE CHARLES DARWIN TRUST**  
**NOTES TO THE ACCOUNTS (CONT.)**  
**FOR THE YEAR ENDED 31<sup>st</sup> DECEMBER 2022**

10. **HERITAGE ASSETS**

During 2003 the Trust received a legacy (the Quentin Keynes Bequest), which comprised rare manuscripts and books related to Charles Darwin's life and writings. A similar bequest from the estate of Richard Keynes was received in 2010. A bequest was also received from the estate of Milo Keynes in 2009. A donation of heritage assets amounting to £84,600 was also received in 2015.

Following a review, part of the Quentin Keynes Bequest was reclassified as an investment asset and was sold during 2015 together with the assets donated in 2015. Most of the remaining heritage assets were then transferred to another charity, the Linnean Society of London, to hold, under trust, for educational purposes. A number of the remaining assets remain with the Trust, most of them now on loan to English Heritage for display at Darwin's home, Down House in Kent.

13. **RELATED PARTY DISCLOSURES**

There were no related party transactions for the year ended 31 December 2022 (2021: none).

## Independent examiner's report to the trustees of The Charles Darwin Trust

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 December 2022.

### Responsibilities and basis of report

As the trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act'). You are satisfied that the accounts of the Company are not required by charity or company law to be audited and have chosen instead to have an independent examination.

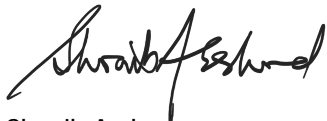
Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the Company's accounts carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

### Independent examiner's statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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.



Shoaib Arshad  
Knox Cropper LLP  
Chartered Accountants  
65 Leadenhall Street  
EC3A 2AD

Date: 18 September 2023