



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1st July 2024 To

30th June 2025

Charity name: The Birmingham and Warwickshire Archaeological CIO

Charity registration number: 1201954

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	THE OBJECTS OF THE SOCIETY ARE TO PROMOTE THE STUDY OF ARCHAEOLOGY AND HISTORY AND THE PRESERVATION, INVESTIGATION, EXCAVATION AND RESTORATION OF LOCAL ANTIQUITIES AND BUILDINGS OF HISTORICAL INTEREST FOR THE PUBLIC BENEFIT.
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 Society produced the latest issue of its Transactions, with articles relating to recent archaeological and historical research in Birmingham and Warwickshire.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees confirm that they have had regard to the guidance issued by the Charity Commission on public benefit, where applicable, when carrying out their duties during the reporting period.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	The Birmingham and Warwickshire Archaeological CIO did not make any grants during the reporting period
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	

Other		
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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	Publishing and distribution of Transactions Vol. 126

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	
Investment performance against objectives	Para 1 41	
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Following transition to CIO and the associated administrative costs, the Society is now in a positive financial position.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Reserves are currently held with a view to re-investing, in line with the Society's investment and reserves policy.
Amount of reserves held	Para 1.22	£48,907
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	
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	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document	Para 1.25	Constitution
How is the charity constituted?	Para 1.25	CIO
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	Election at AGM, or; Co-opting by the Trustees

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's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	The Birmingham and Warwickshire Archaeological CIO
Other name the charity uses	The Birmingham and Warwickshire Archaeological Society
Registered charity number	1201954
Charity's principal address	9 Margaret Street Birmingham B3 3BS

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	Mark Roberts	Secretary		
2	Philip Henry Chapman	President		
3	Rosemary Anne Mayer	Trustee		
4	Dr Jason Begley	Trustee		
5	Jacob Streatfeild-James	Treasurer		
6	Glenn Rose	Trustee		
7	Christopher James Patrick	Trustee		
8	Paul Tucker	Trustee		
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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	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)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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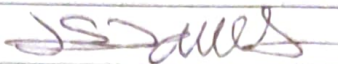
Other optional information

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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)		
Full name(s)	JACOB STREATFEILD JAMES	
Position (eg Secretary, Chair, etc)	TREASURER	
Date	29/04/2026	

Sum of Amount (GBP)	Column Labels							
	2024		2024 Total	2025		2025 Total	Grand Total	
	Qtr3	Qtr4		Qtr1	Qtr2			
Row Labels								
Expenditure	(£482.99)		(£482.99)	(£2,462.00)	(£1,082.46)	(£3,544.46)	(£4,027.45)	
Admin Support	(£100.00)		(£100.00)		(£600.00)	(£600.00)	(£700.00)	
Publication Costs				(£2,462.00)	(£482.46)	(£2,944.46)	(£2,944.46)	
Trustees Insurance	(£264.00)		(£264.00)				(£264.00)	
Website	(£118.99)		(£118.99)				(£118.99)	
Income	£2,593.79	£913.59	£3,507.38	£443.92	£2,135.40	£2,579.32	£6,086.70	
Family Subs	£60.00	£30.00	£90.00				£90.00	
Individual Subs	£719.00	£20.00	£739.00				£739.00	
Institutional Subs	£600.00	£330.00	£930.00				£930.00	
Interest	£6.37	£206.77	£213.14	£0.27	£561.52	£561.79	£774.93	
Publishers Licensing Service	£1,010.30	£132.83	£1,143.13	£271.95	£1,409.53	£1,681.48	£2,824.61	
NSI Income Bonds	£198.12	£193.99	£392.11	£171.70	£164.35	£336.05	£728.16	
Grand Total	£2,110.80	£913.59	£3,024.39	(£2,018.08)	£1,052.94	(£965.14)	£2,059.25	