



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Trustees' Annual Report for the period

From 23/3/2024 **Period start date to** 31/3/2025 **Period end date**

Charity name: Coleorton Heritage Group

Charity registration number: 1207571

Objectives and Activities

Summary of the purposes of the charity as set out in its governing document	The objects of the CIO are: To advance the education and understanding of the public of the history and heritage of Coleorton, Leicestershire, by involving members of the community in learning, research and recording of social, industrial and family history of Coleorton and surrounding areas, expanding the group's archive of information and artefacts, and by delivering events and publications; to promote and support the preservation of heritage in Coleorton for the community.
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.	During the year the Group has undertaken a range of activities and events including history talks, exhibitions, heritage coffee mornings, heritage walks, publications and articles, undertaking research and responding to enquiries. More specifically: In May 2024 we held two open days with St. Mary's Church which included celebrating the Beaumont family's contribution to the establishment of the National Gallery and reshowed the film 'The Gift' which was originally shown as a separate event in March 2024. In September 2024 as part of North West Leicestershire's Hello Heritage month we held an exhibition on 'Coleorton People'. We also joined with Newbold Heritage Group to celebrate 100 years since the opening of New Lount Colliery. In October 2024 we hosted a talk on mining in Coleorton. In December 2024 we supported Coleorton Parish Council with a Community Christmas Event. Members of the Group undertook training in Oral History provided by Leicester University, which was paid for by a grant and recording equipment to continue with this project was purchased. Throughout the year we have continued to run coffee mornings to share and discuss heritage and engage with our local community. We have continued to develop new

	publications on a range of subjects such as Coleorton at War and have updated the Coleorton Heritage Trail leaflet.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	In undertaking these activities, the trustees have had regard to the Charity Commission's guidance on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

Policy on grant making	Not Applicable
Policy on social investment including program related investment	Not Applicable
Contribution made by volunteers	The CIO relies on volunteers who are members of a 'Working Group' to run events such as talks, exhibitions and walks.

Achievements and Performance

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.	Throughout the year the events and activities that we and the community have participated in have led to a greater understanding and awareness within the community of local history and heritage. We have provided opportunities for social interaction at events and coffee mornings. The participation and contributions by local people to the knowledge pool on local heritage has also led to a feeling of worth and value.
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	No further information
Performance of fundraising activities against objectives set	No further information
Investment performance against objectives	No further information

Financial Review

Review of the charity's financial position at the end of the period	The CIO was formed on 23/3/2024 and therefore this reporting period includes 23/3/2024 to 31/3/2024 in addition to the financial year 1/4/2024 – 31/3/2025. The newly formed CIO received a donation of £3852 from its predecessor informal organisation. During this first reporting period the CIO generated an income of £6427 including a grant of £940. The CIO expenditure during this period was £1689. The net surplus at the end of the reporting period was £4738.
Statement explaining the policy for holding reserves stating why they are held	The CIO ensures it has sufficient for it to carry out its activities
Amount of reserves held	£4738.
Reasons for holding zero reserves	Not applicable
Details of fund materially in deficit	Not applicable
Explanation of any uncertainties about the charity continuing as a going concern	The CIO remains a going concern with income exceeding expenditure.

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	In addition to grants received for specific projects relevant to the CIO's objectives, the principal sources of funds are from membership fees, donations, events and sale of publications. These resources are used to continue the development of new publications, print publications and fund talks and exhibition materials. These all support the ongoing understanding and education on the history and heritage of Coleorton.
Investment policy and objectives including any social investment policy adopted	The CIO has no investment or social investment policy or objectives.
A description of the principal risks facing the charity	The CIO has had no significant events and does not foresee any significant risks going forwards. However the Trustees are mindful of any potential risk that may occur.

Structure, Governance and Management

Type of governing document	Constitution
How is the charity constituted?	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	Trustees are co-opted by Trustee board and subject to vote at the AGM

Reference and Administrative details

Charity name	Coleorton Heritage Group
Other name the charity uses	None
Registered charity number	1207571
Charity's principal address	Froggarts Cottage School Lane Peggs green Coleorton Leics. LE67 8HT

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)
Sandra Gay Dillon	Chair	Full year	
Ardita Elaine Sheliah Oldham	Vice-Chair	Full year	
Terence James Ward	Research Officer	Full year	
Kathryn Joan Brown	Secretary	Full year	
Fiona Elizabeth Illingsworth	Treasurer	From 1/5/2024	
			Members of CIO at AGM

Corporate trustees – names of the directors at the date the report was approved:

None

Name of trustees holding title to property belonging to the charity

None

Funds held as custodian trustees on behalf of others

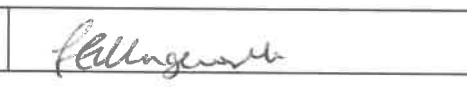
Description of the assets held in this capacity	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	Not applicable
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	Not applicable

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)

SANDRA DILLON	ANNA ELIZABETH ILLINGWORTH
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Position (eg Secretary,
Chair, etc)

Chair	Treasurer
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Date

27/10/2025

COLEORTON HERITAGE GROUP

FINANCIAL STATEMENTS

YEAR ENDED 31 MARCH 2025

Registered charity no. 1207571

COLEORTON HERITAGE GROUP

FINANCIAL STATEMENTS

CERTIFICATE OF APPROVAL

These financial statements were approved by the Trustees and authorised for issue on 12/09/2025 and are signed on behalf of the Trustees by:

..... Sandra Dillon, Chair

..... Fiona Illingsworth, Treasurer

COLEORTON HERITAGE GROUP
INCOME & EXPENDITURE STATEMENT
YEAR ENDED 31 MARCH 2025

	£	2025 £
Income		
Donations	71	
Membership	315	
Grants	940	
Events	900	
Publications	349	
		2,575
Expenditure		
Membership Fees	90	
Training Costs	453	
Event Costs	575	
Publication Costs	313	
Sundry Costs	258	
		1,689
Net surplus		886
Reconciliation of funds		
Total funds brought forward		-
Net surplus		886
Total funds carried forward		886

COLEORTON HERITAGE GROUP

BALANCE SHEET

YEAR ENDED 31 MARCH 2025

	2025
	£
Current assets	
Bank	4,738
Total assets	<u>4,738</u>
 Funds of the charity	
Monies transferred from previous organisation	3852
Net surplus for the year	<u>886</u>
Unrestricted funds	<u>4,738</u>