CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 01/4/2025 **Period start date** **To** 31/3/2026 **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: Our Spring talk was given by Ken Hillier on the topic of "Ashby, Coleorton and the English Civil War". In June Coleorton Heritage Group and St Mary's Church congregation hosted two open days at St Mary's to show visitors the beautiful interior and view displays of the history of the church and Coleorton village. In August the residents of Aqueduct Cottage opened their lovely garden to raise funds for the St John's project. In September last year as part of Hello Heritage festival we held a "History Walk". A group of 15 walkers heard from Fiona and Susan about the history of places and people on the north side of Coleorton village. Later in September we held an exhibition "Coleorton Heritage Collection" at the Beaumont Centre displaying some of the items in our collection, donated or loaned and visitors brought "Things we found in our garden". Our Autumn talk in 2025 was "Rediscovering Coleorton Pottery" by Tim Higgins of the University of Leicester Archaeological Services who told us about the history of the potteries in the north of Coleorton Members of the Group undertook training in Oral History provided by Leicester University, paid for by a grant and recording equipment for his project was purchased. Some interviews with residents have been recorded and the

	project is on-going. 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.

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	This is the second reporting period since the formation of the CIO covering 01/4/2025 to 31/3/2026. The opening balance was £4738. During this reporting period the CIO generated an income of £3686. The CIO expenditure during this period was £1741. The net surplus at the end of the reporting period was £1945.
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	£6682
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)	The CIO's 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 ate 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	Full year	
			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)		F Illingsworth
Full name(s)	Sandra Dillon	Fiona Illingsworth
Position (eg Secretary, Chair, etc)	Chair	Treasurer
Date	26/10/2026	

COLEORTON HERITAGE GROUP

FINANCIAL STATEMENTS

YEAR ENDED 31 MARCH 2026

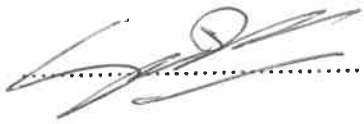
Registered charity no. 1207571

COLEORTON HERITAGE GROUP

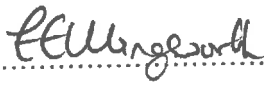
FINANCIAL STATEMENTS

CERTIFICATE OF APPROVAL

These financial statements were approved by the Trustees and authorised for issue on 29/07/2026 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 2026

	£	2026 £	2025 £
Income			
Donations	**285**		71
Membership	**450**		315
Events	**2,535**		900
Publications	**416**		349
Grants	**-**		940
		3,685	2575
Expenditure			
Event Costs	**696**		575
Publication Costs	**241**		313
Sundry Costs	**714**		258
Insurance	**90**		90
Training costs	**-**		453
		1,741	1689
Net surplus		**1,944**	886

COLEORTON HERITAGE GROUP

BALANCE SHEET

YEAR ENDED 31 MARCH 2026

	2026	2025
	£	£
Current assets		
Bank	**6,682**	4738
Total assets	**6,682**	4738
Funds of the charity		
Opening unrestricted funds	**4,738**	3852
Net surplus for the year	**1,944**	886
Closing unrestricted funds	**6,682**	4738
Analysis of Unrestricted Funds		
Non Designated Funds	**4992**	4738
Designated Funds *	**1690**	0
	6682	4738

* Designated funds are to be spent on St John's Church