

UNIVERSITY OF THE THIRD AGE - YORK

England & Wales · Charity number 1007843

Details

Other names	YORK BRANCH OF U3A, YORK U3A
Status	Registered
Legal form	Other
Registered	1992-01-29
Register	View on the Charity Commission register

Contact

Address	York U 3 A Centre 15A Clifford Street York YO1 9RG
Phone	01904 289293
Email	secretary@yorku3a.com
Website	https://york.u3asite.uk/

Activities

Objects: THE ADVANCEMENT OF EDUCATION AND, IN PARTICULAR, THE EDUCATION OF OLDER PEOPLE AND THOSE WHO ARE RETIRED FROM FULL TIME WORK, BY ALL MEANS INCLUDING ASSOCIATED ACTIVITIES CONDUCIVE TO LEARNING AND PERSONAL DEVELOPMENT.

Activities: Our u3a offers learning activities which reflect members wishes and which aim to satisfy the widest possible range of interests; educational, cultural, recreational, physical and social.

Classification

- **How:** Provides Human Resources, Provides Buildings/facilities/open Space, Acts As An Umbrella Or Resource Body
- **What:** Education/training, Arts/culture/heritage/science, Amateur Sport, Environment/conservation/heritage, Economic/community Development/employment, Recreation
- **Who:** Elderly/old People, People With Disabilities, Other Charities Or Voluntary Bodies, Other Defined Groups, The General Public/mankind

Geography

- **Area of benefit:** YORK AND THE SURROUNDING LOCALITY
- North Yorkshire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-07-31	£140,928	£127,739	-	-
2024-07-31	£150,970	£130,220	-	-
2023-07-31	£107,657	£104,477	-	-
2022-07-31	£112,614	£92,097	-	-
2021-07-31	£21,699	£25,744	-	-

Trustees

Name	Role	Appointed
Karen Jane Sawyer	Chair	2022-06-08
Alice Mary Teresa Morwood-Leyland		2025-04-13
Andrew Pilot		2024-07-25
JENNIFER SLEE		2025-04-13
Quinton Charles Smith		2023-03-11
Samantha Triggs		2023-09-18

UNIVERSITY OF THE THIRD AGE - YORK

England & Wales - Charity number 1007843

Accounts



Trustees' Annual Report for the period

From 1 August 2024 To 31 July 2025

Charity name: University of the Third Age - York

Charity registration number: 1007843

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 u3a are to advance the education and, in particular, the education of older people and those who are retired from full time work by all means, including associated activities conducive to learning and personal development, in York and its surrounding locality.
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	We provide a wide range of classes and activities for members, that are led by our members on a self-help basis. The classes, study trips and other activities cover a wide variety of subjects and recreational activities and benefit older people in the York area by giving them the opportunity to advance their learning and general wellbeing.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	In planning our activities for the year, the Trustees have had regard to the Charity Commission guidance 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	We do make any grants.
Policy on social investment including program related investment	Para 1.38	We do not make any social investments.

Contribution made by volunteers	Para 1.38	We do not have any paid staff. All of our activities are led by volunteers. Their contribution is paramount to the success of our organisation. Our course leaders, office and other helpers, and technical team are all volunteer members.
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	<p>Our membership numbers have continued to increase from 1709 at 31 July 2024 to 1862 at 31 July 2025.</p> <p>We provide members with both face-to-face activities and hybrid meetings using Zoom. We continue to provide meeting rooms at the Friends Meeting House in York which are fully equipped, including the use of hearing loops. The hall we use for our monthly talks at the Central Methodist Church is similarly equipped.</p> <p>We have continued to develop the activities on offer.</p> <p>Our international and UK travel provide enriching opportunities for travel in congenial company, which is particularly valued by single members.</p> <p>We produce a bi-monthly newsletter distributed to our members using email and follow this up every month with reminders of up-coming events and have just introduced a monthly "What's On" email for members. We also have an extensive website.</p> <p>We offer a range of activities that promote health and wellbeing, these include group activities, talks and social events to encourage members to come together to exercise and share knowledge and experiences.</p> <p>We reduce social isolation by providing ways for retired people to meet.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

--	--	--

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<p>During the year to 31 July 25 we reported a surplus of £13,189 as compared to £20,750 for the year to 31 July 2024. A decrease of £7,561.</p> <p>Our receipts for financial year to 31 July 2025 were £140,928 compared to £150,970 received in the financial year ending 31st July 2024. A decrease of £10,042 (6.65%).</p> <p>Our payments for the financial year to 31 July 2025 were £127,738 compared to £130,220 paid in the financial year ended 31 July 2024. A decrease of £2,481 (1.9%).</p>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We aim to retain as a general reserve an amount which is the equivalent of no more than one year's planned expenditure, plus 18 months rent for the u3a centre (the rental termination period)
Amount of reserves held	Para 1.22	£136,812
Reasons for holding zero reserves	Para 1.22	Not applicable.
Details of fund materially in deficit	Para 1.24	No funds in deficit.
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	No uncertainties given cash position and viability of the organisation.

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	The principal source of funds is members' subscriptions and contributions to the cost of group activities made by their members.
Investment policy and objectives including any social investment policy adopted	Para 1.46	We do not make investments.
A description of the principal risks facing the charity	Para 1.46	Most of our risks are covered by insurance. Our main remaining risk is the potential high cost of any temporary premises we may have to hire to undertake our educational activities, if our current premises were not available for an extended period. We are holding reserves to cover this risk.
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	Unincorporated members association.
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	Trustees are drawn from our membership and interviewed by an Appointments Sub-committee, and any vacancies are advertised to all members. All Trustees retire at our Annual General Meeting and can stand for re-election provided they have not already exceeded 8 years as a Trustee.

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	All new Trustees receive a welcome pack including essential documents and forms to complete. Trustee courses are available.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The York u3a is affiliated to the National Third Age Trust, which provides central guidance and support. We also network with other local u3a organisations across the Yorkshire and Humberside Region.
Relationship with any related parties	Para 1.51	We maintain a very good mutually supportive relationship with the Friends Meeting House in York who are our landlords.
Other		

Reference and Administrative details

Charity name	University of the Third Age - York
Other name the charity uses	York u3a
Registered charity number	1007843
Charity's principal address	15a Clifford Street York YO1 9RG

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	Karen Sawyer	Chair	Elected 2024/4	
2	Alice Leyland	Secretary	Elected 2025/4	
3	Jeffrey Todd	Treasurer	Elected 2025/4	
4	Andrew Pilot	Membership Secretary	Elected 2024/7	
5	Samantha Triggs	Groups Co-ordinator	Elected 2024/4	
6	Quinn Smith	Technology Trustee	Elected 2023/3	
7	Dr Beryl Oppenheim	Events and Communications Lead	Elected 2025/4	
8	Jennifer Slee		Elected 2025/4	
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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

Director name		
None		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
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	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
None		

Name of chief executive or names of senior staff members (Optional information)

None

Exemptions from disclosure

Reason for non-disclosure of key personnel details

None

Other optional information

None

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	K.J. Sawyer	Alice Morwood-Leyland
Full name(s)	K.J. SAWYER	ALICE MORWOOD-LEYLAND
Position (eg Secretary, Chair, etc)	CHAIR	SECRETARY
Date	11/23/26	



UNIVERSITY OF THE THIRD AGE - YORK 1007843

Receipts and payments accounts

CC16a

For the period from 1/8/2024 To 31/7/2025

Section A Receipts and payments

	Central Funds to the nearest £	Groups to the nearest £	Other to the nearest £	Total funds to the nearest £	Last year to the nearest £	Change £ (Adverse) / %
A1 Receipts						
Members Subscriptions	30,337	-	-	30,337	32,524	(2,187.00) (6.72%)
Gift Aid	-	-	-	-	4,164	(4,164.00) (100.00%)
Donations	6,914	-	-	6,914	10,394	(3,480.00) (33.48%)
Fees for Charitable services (TAM)	1,188	-	-	1,188	1,395	(207.00) (14.84%)
Interest on Deposit Account	1,034	-	-	1,034	1,006	28.00 2.78%
Charitable Activities	19,585	81,870	-	101,455	101,487	(32.00) (0.03%)
	-	-	-	-	-	0.00 0.00%
	-	-	-	-	-	0.00 0.00%
Sub total (Gross income for AR)	59,058	81,870	-	140,928	150,970	(10,042.00) (6.65%)
A2 Asset and investment sales,						
	-	-	-	-	-	0.00 0.00%
	-	-	-	-	-	0.00 0.00%
Sub total	-	-	-	-	-	0.00 -
Total receipts	59,058	81,870	-	140,928	150,970	(10,042.00) (6.65%)
A3 Payments						
Rent of u3a centre	22,735	-	-	22,735	20,406	(2,329.00) (11.41%)
TAT Membership (incl Insurance)	7,200	-	-	7,200	6,900	(300.00) (4.35%)
Telephone, internet, website, software	835	-	-	835	2,460	1,625.00 66.06%
Printing, postage, stationery	3,458	-	-	3,458	2,380	(1,078.00) (45.29%)
Charitable Activities	8,181	78,607	-	86,788	92,842	6,054.00 6.52%
Cost of Charitable Services (TAM)	1,800	-	-	1,800	1,303	(497.00) (38.14%)
Equipment & Equipment Maintenance	2,561	-	-	2,561	2,225	(336.00) (15.10%)
Promotion	-	-	-	-	-	0.00 0.00%
Bank Charges	498	-	-	498	463	(35.00) (7.56%)
IE Fee	450	-	-	450	420	(30.00) (7.14%)
Other Costs	1,414	-	-	1,414	821	(593.00) (72.23%)
Sub total	49,132	78,607	-	127,739	130,220	2,481.00 1.91%
A4 Asset and investment						
	-	-	-	-	-	0.00 0.00%
	-	-	-	-	-	0.00 0.00%
Sub total	-	-	-	-	-	0.00 0.00%
Total payments	49,132	78,607	-	127,739	130,220	2,481.00 1.91%
Net of receipts/(payments)	9,926	3,263.00	-	13,189	20,750	(7,561.00) (36.44%)
A5 Transfers between funds	-	-	-	-	-	
A6 Cash funds last year end	114,441	9,182	-	123,623	102,873	
Cash funds this year end	124,367	12,445	-	136,812	123,623	

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

Categories	Details	Unrestricted to nearest £	Group Funds to nearest £	Other Funds to nearest £
B1 Cash funds	Bank & Cash	124,367	12,445	-
		-	-	-
		-	-	-
	Total cash funds	124,367	12,445	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds	Restricted funds	Endowment funds
	Details	to nearest £	to nearest £	to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-	-
		-	-	-
		-	-	-

		-	-
		-	-


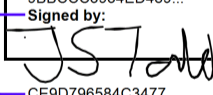
B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

B5 Liabilities

Details	Fund to which	Amount due	When due
Creditors		-	
		-	
		-	
		-	
		-	

Signed by one or two trustees on behalf

Signed by:	Signature	Print Name	Date of
		K J Sawyer	3/12/2026
		Jeffrey Todd	3/15/2026

THE UNIVERSITY OF THE THIRD AGE - YORK

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF

THE UNIVERSITY OF THE THIRD AGE - YORK

I report to the trustees on my examination of the accounts of The University of the Third Age - York (the charity) for the year ended 31st July 2025 which are set out on pages 1 to 2.

Responsibilities and basis of report

As the charity trustees of the charity you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('The Act').

I report in respect of my examination of the Trustee's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the charity Commissioner under section 145(5)(b) of the 2011 Act.

Independent examiner's statement

I have completed my examination. I confirm that no material 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 in respect of the Trust as required by section 130 of the Act; or
- (2) the accounts do not accord with those records; or

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.



Nigel Everard BA FCA
Hunter Gee Holroyd
Club Chambers
Museum Street
York YO1 7DN

Date.....20/3/2026

UNIVERSITY OF THE THIRD AGE - YORK

England & Wales - Charity number 1007843

Accounts



Trustees' Annual Report for the period

From **1 August 2023** to **31 July 2024**

Charity name: **University of the Third Age - York**

Charity registration number: **1007843**

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 u3a are to advance the education and, in particular, the education of older people and those who are retired from full time work by all means, including associated activities conducive to learning and personal development, in York and its surrounding locality.
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	We provide a wide range of classes and activities for members, that are led by our members on a self-help basis. The classes, study trips and other activities cover a wide variety of subjects and recreational activities and benefit older people in the York area by giving them the opportunity to advance their learning and general wellbeing.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	In planning our activities for the year, the Trustees have had regard to the Charity Commission guidance 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	We do not make grants.
Policy on social investment including program related investment	Para 1.38	We do not make any social investment.
Contribution made by volunteers	Para 1.38	We do not have any paid staff. All of our activities are led by volunteers. Their contribution is paramount to the success of our organisation. Our course leaders, office and other helpers, and technical team and Trustees are all volunteer members.
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	<p>Our membership numbers have continued to increase from 1675 at 31 July 2023 to 1709 at 31 July 2024.</p> <p>We provide members with both face-to-face activities and hybrid meetings using Zoom. We continue to provide meeting rooms at the Friends Meeting House in York which are fully equipped, including the use of hearing loops. The hall we use for our monthly talks at the Central Methodist Church is similarly equipped.</p> <p>We have continued to develop the activities on offer.</p> <p>Our international and UK travel provide enriching opportunities for travel in congenial company, which is particularly valued by single members.</p> <p>We produce a bi-monthly newsletter distributed to our members using email and follow this up every month with reminders of up-coming events. We have an extensive website.</p> <p>We offer a range of activities that promote health and wellbeing, these include group activities, talks and social events to encourage members to come together to exercise and share knowledge and experiences.</p> <p>We reduce social isolation by providing ways for retired people to meet.</p>

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<p>During the year to 31 July 24 we reported a surplus of £20,750 as compared to £3,180 for the year to 31 July 2023. An increase of £17,570.</p> <p>Our receipts for financial year to 31 July 2024 were £150,670 compared to £107,657 received in the financial year ending 31st July 2023. An increase of £43,013 (40.23%).</p> <p>This was mostly due to the increase in membership fees received in July 2024 for the year 2024/25.</p> <p>Our payments for the financial year to 31 July 2024 were £130,220 compared to £104,477 paid in the financial year ended 31 July 2023. An increase of £25,743 (24.64%).</p> <p>This was mostly due to a planned stepped increase in the cost of the rent for the u3a centre. This was catered for by the increase in membership fees.</p>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We aim to retain as a general reserve an amount which is the equivalent of no more than one year's planned expenditure, plus 18 months rent for the u3a centre (the rental termination period).
Amount of reserves held	Para 1.22	We held cash just short of £124K at the end of the year.
Reasons for holding zero reserves	Para 1.22	Not applicable.
Details of fund materially in deficit	Para 1.24	No funds in deficit.
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	No uncertainties given cash position and viability of the organisation.

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	The principal source of funds is members' subscriptions and contributions to the cost of group activities made by their members.
	Para 1.46	We do not make investments.

Investment policy and objectives including any social investment policy adopted		
A description of the principal risks facing the charity	Para 1.46	<p>Most of our risks are covered by insurance. Our main remaining risk is the potential high cost of any temporary premises we may have to hire to undertake our educational activities, if our current premises were not available for an extended period. We are holding reserves to cover this risk.</p>
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	Unincorporated members association.
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	Trustees are drawn from our membership and interviewed by an Appointments Sub-committee, and any vacancies are advertised to all members. All Trustees retire at our Annual General Meeting and can stand for re-election provided they have not already exceeded 8 years as a Trustee.

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	All new Trustees receive a welcome pack including essential documents and forms to complete. Trustee courses are available.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The York u3a is affiliated to the National Third Age Trust, which provides central guidance and support. We also network with other local u3a organisations across the Yorkshire and Humberside Region.
Relationship with any related parties	Para 1.51	We maintain a very good mutually supportive relationship with the Friends Meeting House in York who are our landlords.
Other		

Reference and Administrative details

Charity name	University of the Third Age - York
Other name the charity uses	York u3a
Registered charity number	1007843
Charity's principal address	15a Clifford street York YO1 9RG

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	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
None		

Name of chief executive or names of senior staff members (Optional information)

None

Exemptions from disclosure

Reason for non-disclosure of key personnel details

None

Other optional information

None

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)



K.S. Sawyer

Full name(s)

Andrew Pilot

Karen Sawyer

Position (eg Secretary,
Chair, etc)

Treasurer

Chair

Date

28 / 01 / 2025

Receipts and payments accounts

For the period from	1/8/2023	To	31/7/2024
---------------------	----------	----	-----------

Section A Receipts and payments

	Central Funds to the nearest £	Groups to the nearest £	Other to the nearest £	Total funds to the nearest £	Last year to the nearest £	Change £ (Adverse) / Favourable %	
A1 Receipts							
Members Subscriptions	32,524	-	-	32,524	28,625	3,899.00	13.62%
Gift Aid	4,164	-	-	4,164	3,865	299.00	7.74%
Donations	10,394	-	-	10,394	1,295	9,099.00	702.63%
Fees for Charitable services (TAM)	1,395	-	-	1,395	1,402	(7.00)	(0.50%)
Interest on Deposit Account	1,006	-	-	1,006	379	627.00	165.44%
Charitable Activities	16,397	85,090	-	101,487	72,091	29,396.00	40.78%
	-	-	-	-	-	0.00	0.00%
	-	-	-	-	-	0.00	0.00%
Sub total(Gross income for AR)	65,880	85,090	-	150,970	107,657	43,313.00	40.23%
A2 Asset and investment sales, (see table).							
	-	-	-	-	-	0.00	0.00%
	-	-	-	-	-	0.00	0.00%
Sub total	-	-	-	-	-	0.00	-
Total receipts	65,880	85,090	-	150,970	107,657	43,313.00	40.23%
A3 Payments							
Rent of u3a centre	20,406	-	-	20,406	15,792	(4,614.00)	(29.22%)
TAT Membership (incl Insurance)	6,900	-	-	6,900	6,700	(200.00)	(2.99%)
Telephone, internet, website, software	2,460	-	-	2,460	2,501	41.00	1.64%
Printing, postage, stationery	2,380	-	-	2,380	2,783	403.00	14.48%
Charitable Activities	6,478	86,364	-	92,842	71,422	(21,420.00)	(29.99%)
Cost of Charitable Services (TAM)	1,303	-	-	1,303	1,020	(283.00)	(27.75%)
Equipment & Equipment Maintenance	2,225	-	-	2,225	1,796	(429.00)	(23.89%)
Promotion	-	-	-	-	38	38.00	100.00%
Bank Charges	463	-	-	463	444	(19.00)	(4.28%)
Audit Fee	420	-	-	420	384	(36.00)	(9.38%)
Other Costs	821	-	-	821	1,597	776.00	48.59%
Sub total	43,856	86,364	-	130,220	104,477	(25,743.00)	(24.64%)
A4 Asset and investment purchases, (see table)							
	-	-	-	-	-	0.00	0.00%
	-	-	-	-	-	0.00	0.00%
Sub total	-	-	-	-	-	0.00	0.00%
Total payments	43,856	86,364	-	130,220	104,477	(25,743.00)	(24.64%)
Net of receipts/(payments)	22,024	(1,274.00)	-	20,750	3,180	17,570.00	552.52%
A5 Transfers between funds	-	-	-	-	-		
A6 Cash funds last year end	92,417	10,456	-	102,873	99,693		
Cash funds this year end	114,441	9,182	-	123,623	102,873		

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

Categories	Details	Unrestricted funds to nearest £	Group Funds to nearest £	Other Funds to nearest £
B1 Cash funds	Bank & Cash	114,441	9,182	-
		-	-	-
		-	-	-
	Total cash funds	114,441	9,182	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets				
		Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		.	.
		.	.
		.	.
		.	.
		.	.
		.	.
		.	.
		.	.
		.	.
		.	.
		.	.

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
Creditors		.	
		.	
		.	
		.	
		.	
		.	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Karen Sawyer	28/01/25
	Andrew Pilot	28/01/25

THE UNIVERSITY OF THE THIRD AGE - YORK

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF

THE UNIVERSITY OF THE THIRD AGE - YORK

I report to the trustees on my examination of the accounts of The University of the Third Age - York (the charity) for the year ended 31st July 2024 which are set out on pages 1 to 2.

Responsibilities and basis of report

As the charity trustees of the charity you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('The Act').

I report in respect of my examination of the Trustee's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the charity Commissioner under section 145(5)(b) of the 2011 Act.

Independent examiner's statement

I have completed my examination. I confirm that no material 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 in respect of the Trust as required by section 130 of the Act; or
- (2) the accounts do not accord with those records; or

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.



Nigel Everard BA FCA
Hunter Gee Holroyd
Club Chambers
Museum Street
York YO1 7DN

Date...24 January 2025

UNIVERSITY OF THE THIRD AGE - YORK

England & Wales - Charity number 1007843

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES

UNIVERSITY OF THE THIRD AGE - YORK

1007843

Receipts and payments accounts

CC16a

For the period
from

01/08/2022

To

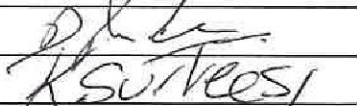
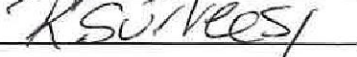
31/07/2023

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					
Members Subscriptions	28,625	-	-	28,625	37,450
Gift Aid	3,865	-	-	3,865	4,139
Donations	1,295	-	-	1,295	1,063
Fees for Charitable services (TAM)	1,402	-	-	1,402	771
Interest on Deposit Account	379	-	-	379	52
Charitable Activities	72,091	-	-	72,091	69,139
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	107,657	-	-	107,657	112,614
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	107,657	-	-	107,657	112,614
A3 Payments					
Rent of u3a centre	15,792	-	-	15,792	10,827
TAT Membership (incl Insurance)	6,700	-	-	6,700	6,328
Telephone, internet, website, software	2,501	-	-	2,501	2,471
Printing, postage, stationery	2,783	-	-	2,783	978
Charitable Activities	71,422	-	-	71,422	65,398
Cost of Charitable Services (TAM)	1,020	-	-	1,020	1,834
Equipment & Equipment Maintenance	1,796	-	-	1,796	2,037
Promotion	38	-	-	38	910
Bank Charges	444	-	-	444	728
Audit Fee	384	-	-	384	360
Other Costs	1,597	-	-	1,597	226
Sub total	104,477	-	-	104,477	92,097
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	104,477	-	-	104,477	92,097
Net of receipts/(payments)	3,180	-	-	3,180	20,517
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	99,693	-	-	99,693	79,176
Cash funds this year end	102,873	-	-	102,873	99,693

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bank & Cash	102,873	-	-
			-	-
		-	-	-
	Total cash funds	102,873	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B4 Assets retained for the charity's own use	Details	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B5 Liabilities	Details	-	-	-
	Creditors	-	-	-
		-	-	-
		-	-	-
		-	-	-

Signed by one or two trustees on behalf of all the trustees	Fund to which liability relates	Amount due (optional)	When due (optional)
Signature	Print Name		Date of approval
	David Maughan Brown		14/2/24
	Kathryn Surtees		11/2/24



Trustees' Annual Report for the period

From 1 Aug 2022 to 31 Jul 2023

Charity name: University of the Third Age - York

Charity registration number: 1007843

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 u3a are to advance the education and, in particular, the education of older people and those who are retired from full time work by all means, including associated activities conducive to learning and personal development, in York and its surrounding locality.
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	We provide a wide range of classes and activities for members, that are led by our members on a self-help basis. The classes, study trips and other activities cover a wide variety of subjects and recreational activities, and benefit older people in the York area by giving them the opportunity to advance their learning and general wellbeing.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	In planning our activities for the year, the Trustees have had regard to the Charity Commission guidance 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	We do not make grants.
Policy on social investment including program related investment	Para 1.38	We do not make any social investment.
Contribution made by volunteers	Para 1.38	We do not have any paid staff. All of our activities are led by volunteers. Their contribution is paramount to the success of our organisation. Our course leaders, office and other helpers, and technical team and Trustees are all volunteer members.
Other		

Achievements and Performance

	SORP reference	
<p>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.</p>	<p>Para 1.20</p>	<p>Our membership numbers have increased from 1614 at 31 July 2022 to 1675 at 31 July 2023. More members have returned to face-to-face activities and we continue to provide meeting rooms at the Friends Meeting House in York which are fully equipped for hybrid meetings using Zoom. The hall we use for our monthly talks at the Central Methodist Church is similarly equipped.</p> <p>We have continued to develop the activities on offer.</p> <p>Our international and UK travel provide enriching opportunities for travel in congenial company, which is particularly valued by single members.</p> <p>We produce a bi-monthly newsletter distributed to our members using email, and follow this up every month with reminders of up-coming events. We have an extensive website.</p> <p>We have worked with the management of the Friends Meeting House in providing Warm Spaces for members and others, and have started smaller Saturday Social events to encourage members to come together to share knowledge and experiences.</p> <p>We reduce social isolation by providing ways for retired people to meet.</p>

Financial Review

<p>Review of the charity's financial position at the end of the period</p>	<p>Para 1.21</p>	<p>During the year to 31 July 23 we reported a surplus of £3,180 as compared to £20,517 for the year to 31 July 2022. A reduction of £17,337.</p> <p>Our receipts for financial year to 31 July 2023 were £107,657 compared to £112,614 received in the financial year ending 31st July 2022. A reduction of £4,957 (4.40%).</p> <p>This was partly due to the change in policy and process re renewals in the year ending 31st July 2022, which inflated the income of that year by almost £14k.</p> <p>If we discount this anomaly receipts would be up by approximately 8 %.</p> <p>Our payments for the financial year to 31 July 2023 were £104,477 compared to £92,097 paid in the financial year ended 31 July 2022. An increase of £12,380 (13.44%).</p> <p>This was partly due to a planned stepped increase in the cost of the rent for the u3a centre, which accounted for £4,965 of the increase.</p> <p>If we discount this anomaly the payments would be up by approximately 8%. This is equivalent to the adjusted increase in income.</p>
<p>Statement explaining the policy for holding reserves stating why they are held</p>	<p>Para 1.22</p>	<p>We aim to retain as a general reserve an amount which is the equivalent of no more than one year's planned expenditure, plus a contingency to enable us to meet our significant future premises' lease liabilities if revenue continues to fall. We currently have some uncertainty about potential lease renewal costs from August 2024.</p>
<p>Amount of reserves held</p>	<p>Para 1.22</p>	<p>We held cash just short of £103K at the end of the year.</p>
<p>Reasons for holding zero reserves</p>	<p>Para 1.22</p>	<p>Not applicable.</p>
<p>Details of fund materially in deficit</p>	<p>Para 1.24</p>	<p>No funds in deficit.</p>
<p>Explanation of any uncertainties about the charity continuing as a going concern</p>	<p>Para 1.23</p>	<p>No uncertainties given cash position and viability of the organisation.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

<p>The charity's principal sources of funds (including</p>		<p>The principal source of funds is members' subscriptions and</p>
--	--	---

any fundraising)	Para 1.47	contributions to the cost of group activities made by their members.
------------------	-----------	---

Investment policy and objectives including any social investment policy adopted	Para 1.46	We do not make investments.
A description of the principal risks facing the charity	Para 1.46	Most of our risks are covered by insurance. Our main remaining risk is the potential high cost of any temporary premises we may have to hire to undertake our educational activities, if our current premises were not available for an extended period or there were issues in negotiating our licence renewal. In addition, we will need to increase receipts or reduce payments to fund the new licence costs We are holding reserves to cover hire costs or to fund the increased licence costs in the medium term, while we increase income or reduce costs.
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	Unincorporated members association.
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	Trustees are drawn from our membership and interviewed by an Appointments Sub-committee, and any vacancies are advertised to all members. All Trustees retire at our Annual General Meeting and can stand for re-election provided they have not already exceeded 8 years as a Trustee.

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	All new Trustees receive a welcome pack including essential documents and forms to complete. Trustee courses are available.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The York u3a is affiliated to the National Third Age Trust, which provides central guidance and support. We also network with other local u3a organisations across the Yorkshire and Humberside Region.
Relationship with any related parties	Para 1.51	We maintain a very good mutually supportive relationship with the Friends Meeting House in York who are our landlords.
Other		

Reference and Administrative details

Charity name	University of the Third Age - York
Other name the charity uses	York u3a
Registered charity number	1007843
Charity's principal address	15a Clifford street York YO1 9RG

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	Ren Buss	Treasurer	2023/03-2023/08	
2	Anna Baldwin	Talks Secretary (joint)	Retired 2023/03	
3	Mike Barnard	Secretary	Retired 2023/03	
4	Mike Barnard	Trustee	2023/03 – 2023/07	
5	David Maughan Brown	Chair		
6	Nick David	Regional Representative	Retired 2023/03	
7	Brian Parkin	Membership Secretary		
8	Rosemary Royds Tree	Groups Co-ordinator	Retired 2023/03	
9	Mo Sandland	Assist Membership Sec		
10	Karen Sawyer	Office Co-ordinator	Retired 2023/03	
11	Karen Sawyer	Secretary	Appointed 2023/03	
12	Quinn Smith	Equipment Manager	Appointed 2023/03	
13	Kathryn Surtees	Treasurer	Appointed 2023/08	
14	Samantha Triggs	Groups Co-ordinator	Appointed 2023/10	

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

Director name		
None.		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year
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	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
None.		

Name of chief executive or names of senior staff members (Optional information)

None.

Exemptions from disclosure

Reason for non-disclosure of key personnel details

None.

Other optional information

None.

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	<i>K.S. Sawyer</i>	<i>David Maughan Brown</i>
Full name(s)	Karen Sawyer	David Maughan Brown
Position (eg Secretary, Chair, etc)	Secretary	Chair

Date 14/02/2024

THE UNIVERSITY OF THE THIRD AGE - YORK

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF

THE UNIVERSITY OF THE THIRD AGE - YORK

I report to the trustees on my examination of the accounts of The University of the Third Age - York (the charity) for the year ended 31st July 2023 which are set out on pages 1 to 2.

Responsibilities and basis of report

As the charity trustees of the charity you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('The Act').

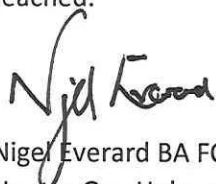
I report in respect of my examination of the Trustee's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the charity Commissioner under section 145(5)(b) of the 2011 Act.

Independent examiner's statement

I have completed my examination. I confirm that no material 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 in respect of the Trust as required by section 130 of the Act; or
- (2) the accounts do not accord with those records; or

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.



Nigel Everard BA FCA
Hunter Gee Holroyd
Club Chambers
Museum Street
York YO1 7DN

Date.....21/02/2024

UNIVERSITY OF THE THIRD AGE - YORK

England & Wales - Charity number 1007843

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name University of the Third Age - York	No (if any) 1007843
--	------------------------

CC16a

Receipts and payments accounts

For the period from	Period start date 01-Aug-21	To	Period end date 31-Jul-22
------------------------	--------------------------------	----	------------------------------

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 and Legacies	43,423	-	-	43,423	17,860
Charitable Activities	69,139	-	-	69,139	3,793
Investment Income	52	-	-	52	46
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	112,614	-	-	112,614	21,699
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	112,614	-	-	112,614	21,699
A3 Payments					
Charitable Activities	92,097	-	-	92,097	25,744
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	92,097	-	-	92,097	25,744
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	92,097	-	-	92,097	25,744
Net of receipts/(payments)	20,517	-	-	20,517	- 4,045
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	79,176	-	-	79,176	83,221
Cash funds this year end	99,693	-	-	99,693	79,176

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bank and cash	99,962	-	-
		-	-	-
		-	-	-
	Total cash funds	99,962	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	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
MJBarnard	Mike Barnard	3 Feb 23
B Buss	Brenda Buss	6 Feb 23



Trustees' Annual Report for the period

From 1 Aug 2021 to 31 Jul 2022

Charity name: University of the Third Age - York

Charity registration number: 1007843

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 u3a are to advance the education and, in particular, the education of older people and those who are retired from full time work by all means, including associated activities conducive to learning and personal development, in York and its surrounding locality.
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	We provide a wide range of classes and activities for members, that are led by our members on a self-help basis. The classes, study trips and other activities, cover a wide variety of subjects and physical activities, and benefit older people in the York area by giving them the opportunity to advance their education and learning.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	In planning our activities for the year, the trustees have had regard to the Charity Commission guidance 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	We do not make grants.
Policy on social investment including program related investment	Para 1.38	We do not make any social investment.
Contribution made by volunteers	Para 1.38	We do not have any paid staff. All of our activities are led by volunteers. Their contribution is paramount to the success of our organisation. Our course leaders, office and other helpers, and technical team and Trustees are all volunteer members.
Other		

Achievements and Performance

	SORP reference	
<p>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.</p>	<p>Para 1.20</p>	<p>We have resumed almost all our pre-Covid activities since mid-2022. Our membership numbers have recovered to 1614 at 31 July 2022 from the Covid-induced decline between 2020-2022 (1800 at 31 July 2020 - 1518 at 31 Jul 2021) but some members are still anxious about face-to-face meetings. We have responded to this by ensuring that the meeting rooms we use at the Friends Meeting House in York are fully equipped for hybrid meetings using Zoom, and that the hall we use for our monthly talks at the Central Methodist Church is similarly equipped. We are currently not charging members who attend either our interest group meetings or the Saturday talks by Zoom, for their 'attendance'. This has a negative impact on our income but is covered by our reserves.</p> <p>The most significant area of activity that still lags behind pre-Covid levels is international travel, but we do have a visit to Provence organised for late summer 2023. Our UK travel group has successfully resumed its activities.</p> <p>We produced a bi-monthly newsletter distributed to our members using email, and now follow this up every month with reminders of up-coming events. We have an extensive website.</p>

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	During the year to 31 July 22 we reported a surplus of £20,517 (as compared to a deficit of £4,047 for the year to 31 July 2021). This £25k improvement is in part (£11k) because of operational recovery following Covid but also the result of a decision to change policy and process re renewals. We therefore accepted payment for subscription renewals due at 1 August 2022 before the 31 July 22 year ended. As we record on a cash basis this has resulted in our declared surplus for the year to 31 July 2022 increasing by almost £14k.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We aim to retain as a general reserve an amount which is the equivalent of no more than one year's planned expenditure, plus a contingency to enable us to meet our significant future premises lease liabilities if revenue continues to fall. We currently have some uncertainty about potential lease renewal costs from August 2024.
Amount of reserves held	Para 1.22	We held cash just short of £100K at the end of the year.
Reasons for holding zero reserves	Para 1.22	Not applicable.
Details of fund materially in deficit	Para 1.24	No funds in deficit.
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	No uncertainties given cash position and viability of the organisation.

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	The principal source of funds is members' subscriptions and contributions to the cost of group activities made by their members.
--	-----------	--

Investment policy and objectives including any social investment policy adopted	Para 1.46	We do not make investments.
A description of the principal risks facing the charity	Para 1.46	Most of our risks are covered by insurance. Our main remaining risk is the potential high cost of any temporary premises we may have to hire to undertake our educational activities, if our current premises were not available for an extended period or there were issues in negotiating our lease renewal. We are holding reserves to cover this eventuality.
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	Unincorporated members association.
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	Trustees are drawn from our membership and interviewed by an Appointments Sub-committee, and any vacancies are advertised to all members. All Trustees retire at our Annual General Meeting and can stand for re-election provided they have not exceeded 9 years as a Trustee.

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	All new Trustees receive a welcome package including essential documents and forms to complete. Trustee courses are available.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The York u3a is affiliated to the National Third Age Trust, which provides central guidance and support. We also network with other local u3a organisations across the Yorkshire and Humberside Region.
Relationship with any related parties	Para 1.51	We maintain a very good mutually supportive relationship with the Friends Meeting House in York who are our landlords.
Other		

Reference and Administrative details

Charity name	University of the Third Age York
Other name the charity uses	York u3a
Registered charity number	1007843
Charity's principal address	15a Clifford street York YO1 9RG

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	Lorrae Atkins	Web Manager	Retired 2021/09	
2	Anna Baldwin	Talks Secretary (joint)		
3	Mike Barnard	Secretary & Region Rep		
4	Ren Buss	Treasurer		
5	Nick David	Regional Representative		
6	Peter Jarman	Talks Secretary (joint)	Retired 2022/03	
7	Sandra Mason	Membership Secretary	Retired 2021/09	
8	David Maughan Brown	Chair		
9	Rosemary Royds Tree	Groups Co-ordinator		
10	Steve Russell	Assistant Treasurer	Retired 2022/03	
11	Mo Sandland	Assist Membership Sec		
12	Nancy Conway	Office Co-ordinator	Retired 2022/03	
13	Karen Sawyer	Office Co-ordinator	Co-opted 2022/06	
14	Brian Parkin	Membership Secretary	Elected 2021/09	

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

Director name		
None.		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
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	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
None.		

Name of chief executive or names of senior staff members (Optional information)

None.

Exemptions from disclosure

Reason for non-disclosure of key personnel details

None.


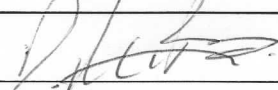
Other optional information

None.

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)	Mike Barnard	David Maughan Brown
Position (eg Secretary, Chair, etc)	Secretary	Chair

Date 3 Feb 2023

THE UNIVERSITY OF THE THIRD AGE - YORK

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF

THE UNIVERSITY OF THE THIRD AGE - YORK

I report to the trustees on my examination of the accounts of The University of the Third Age - York (the charity) for the year ended 31st July 2022 which are set out on pages 1 to 2.

Responsibilities and basis of report

As the charity trustees of the charity you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('The Act').

I report in respect of my examination of the Trustee's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the charity Commissioner under section 145(5)(b) of the 2011 Act.

Independent examiner's statement

I have completed my examination. I confirm that no material 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 in respect of the Trust as required by section 130 of the Act; or
- (2) the accounts do not accord with those records; or

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.



Nigel Everard BA FCA
Hunter Gee Holroyd
Club Chambers
Museum Street
York YO1 7DN

Date.....6th February 2023