



Trustees' Annual Report for the period

Period start date		Period end date	
01	01	2024	31
From		To	
		12 2024	

Section A Reference and administration details

Charity name

U3A Canterbury & District

Other names charity is known by

Registered charity number (if any) 1026681

Charity's principal address

8 Orange Street

Canterbury

Kent

Postcode

CT1 2JA

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	Robin Terry	Chair		
2	Keith Watson	Vice Chair		
3	Trevor Peel	Treasurer		
4	John Wetherell	Joint Membership Secretary		
5	Lizzie Arrow	Joint Membership Secretary		
6	Angela Tippet	Course Administrator		
7	Keith Kolsteren		10.04.24-31.12.24	
8	Lawrence Stone		10.04.24-31.12.24	
9	Christine Hughes	Vice Chair	01.04.24-09.08.24	
10	Jonathan Butchers	Course Development	02.08.24-31.12.24	
11	Judith Gladman		07.10.24-31.12.24	
12	Ursula Steiger	Director of Studies	01.01.24- 10.04.24	
13				
14				

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document
(eg. trust deed, constitution)

The constitution is based upon a model suggested by the Third Age Trust (TAT) to which the U3A Canterbury & District (U3A) is affiliated. This was last revised at the AGM on 13th July 2020 following further changes recommended by TAT and the Charity Commission.

How the charity is constituted
(eg. trust, association, company)

Trust

Trustee selection methods
(eg. appointed by, elected by)

Trustees are members of the U3A and collectively form the committee which runs it. The AGM elects the committee members, but more can be co-opted as required during the year. Each Trustee is required to answer questions regarding their suitability and probity to act as a Trustee for the charity.

Section C

Objectives and activities

Summary of the objects of the charity set out in its governing document

u3a Canterbury & District (C&D) is a learning co-operative which draws upon the knowledge, experience and skills of its members to organise courses, interest groups, events and activities in accordance with the wishes of the membership. Learning is purely for pleasure with no distinction made between group leaders and learners. No accreditation or certificates exist and there are no assessments or qualifications to be gained. The organisation exists for members to share and enjoy learning and members are encouraged to both lead and learn.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

A steady increase in membership and a full programme of courses and events took place in 2024. Executive Committee meetings were held monthly.
The Chair attended Kent u3a Network events; and participated in monthly u3a online Chairs' Forum meetings.
The University of Kent (UKC) supports u3a C & D, through a Memorandum of Understanding, as part of their commitment to engage with the public through its research, and to strengthen its links with the community. The arrangement supports the u3a Cinema Interest Group with film screenings in the Gulbenkian Arts Centre, as well as enabling u3a C & D members to volunteer to take part in individual student research topics. The arrangement also led to an introduction to the Moving Memory Dance Theatre with their Groovin' Well workshop initiative; in which many u3a C & D members participated and the u3a research group subsequently providing written feedback on the performance sessions. Canterbury Christ Church University (CCCU) also supports u3a C & D, through a new Memorandum of Understanding substantially agreed in 2024.
Guidance from the Charity Commission, as well as that received from TAT, is reviewed by the committee when received and action taken as necessary.

For more details, see section D below.

Additional details of objectives and activities (Optional information)

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

There were 1,130 members at year-end. A Joining Session was held in most months. Hosted by the Membership Team and a band of volunteers it informs potential new members of the u3a ethos and principles as well as explaining current courses and activities available.

All new members received a personal welcome letter from the Chair and a copy of our latest Courses programme.

Welcome Sessions were launched in September to enable new members to gain more information and for committee members to meet and get to know them.

An Open Day took place in May to "showcase" activities within u3a C& D. Information and taster sessions were provided to attract potential new members.

An Information card is produced annually, listing committee members, key contacts, and the Monthly meeting programme. In addition, a monthly News Bulletin is distributed by an editorial team to all members.

We are proud of our extensive programme of over 100 courses which run over the autumn and winter period. They cover both academic and non-academic subjects. All the Tutors, Activity Leaders, Hosts and Coordinators who are involved in the courses are a committed and dependable group of people who share their knowledge, expertise and understanding of a subject or activity. The Summer programme gives tutors and activity leaders an opportunity to run taster sessions in new subjects and ideas. All leaders were celebrated at the annual lunch in April, and entertained by our guest speaker, Trevor Minter, Deputy Lord Lieutenant of Kent.

During the summer period more outdoor activities complement the learning and social activities programme. A new courses' booking system was successfully launched in September.

The Third Age Trust (TAT) supported the re-launch of the u3a C & D website in November based on a new system called SiteWorks as TAT are no longer supporting the previous SiteBuilder system. The website is a useful platform to publicise details and course activities.

A research group working with the UKC has been active since 2014. In November the group presented their most recent project, which explored the potential benefits to health and wellbeing of engaging in the Groovin' Well workshops. They were able to identify a range of benefits, including social connectivity, age sensitivity, cognitive integrity, and personal creativity from the participation of 25 individuals in the dance workshops. Four one day outings were organised during the year to "William Morris and cruise" (which was so popular it was run again); Museum of the Moving Image Deal; Choral evening Song and Christmas Lights.

Two five day coach holidays were organised during the year to South Yorkshire (in April), and Cheshire and North Wales (in September)

Section E

Financial review

Brief statement of the charity's policy on reserves

The committee agreed the reserves policy in June 2013. It takes account of advice by the Charity Commission and that of the Third Age Trust. The committee on recommendation by the Treasurer determines the actual level.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Our u3a is supported through funds received from its members from subscriptions and course fees. These are used to fund our objectives as detailed in section C and D of this report through the hire of course venues, rental of the office accommodation at Orange Street, payment of speaker fees etc. In addition, we receive Gift Aid from HMRC.

A small sum is received as interest payments from the bank.

In 2023 we resumed charging course fees after their suspension during the COVID epidemic. In 2024 these were reduced from £1.50 to £1 per session and will be maintained at this rate for 2025.

The committee regularly reviewed financial reports during the year.

Section F

Other optional information

Section G



Declaration

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

Signed on behalf of the charity's trustees

Signature(s)

Full name(s)

	
Robin Stuart Terry	Trevor Peel

Position (e.g. Secretary,
Chair, etc.)

Chair

Treasurer

Date

7 April 2025

U3A Canterbury & District
Consolidated Balance Sheet as at 31st December 2024

All funds listed are Unrestricted

	2024			2023	
	£	£	£	£	£
Cash at Lloyds Bank A/C Current	49,969			42,192	
Cash at Lloyds bank A/C Outings	3,554			2,635	
Cash at Lloyds bank A/C Deposit	15,000			15,000	
PayPal A/C	39			0	
Total cash 1st Jan 2024	68,562			59,827	59,827
Net Movement of Funds ex Financial Statement	4,454			8,696	
Total Value at Y/E 2024	73,396		73,396	68,924	68,924

REPRESENTED BY;

CURRENT ASSETS

	31.12.24		31.12.23	
	£	Total	£	Total
Cash at Lloyds Bank A/C Current	53,790		49,969	
Cash at Lloyds bank A/C Outings	4,188		3,554	
Cash at Lloyds bank A/C Deposit	15,000		15,000	
PayPal A/C	39		39	
Sub Total at year end	73,017	73,017	68,562	68,562

FIXED ASSETS

B/Fwd	401		327	
Purchased in Year	0		100	
Total Fixed Assets	401		427	
Less depreciation/written off	-22		-26	
Net Fixed Assets	379	379	401	401

CREDITORS

Amounts falling due	0		0	
PayPal/Chqs bfwed ex last year-	0		0	
PayPal/chqs not cld	0	0	-40	-40
Net Assets		73,396		68,924

This Financial Statement has been examined by the Independent Examiner
Sue Asser, whose statement is provided seperately.

Signed:



Trevor Peel
Treasurer



Robin Terry
Chair

Date: 11.12.25

Date: 11.2.25

Independent examiner's report to the trustees of IJ3A Canterbury & District Registered Charity 1026681

I report on the accounts of the Trust for the year ended 31st December 2024, which are set out below.

Respective responsibilities of trustees and examiner.

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act
- to follow the procedures laid down in the general Directions given by the commission under section 145(S)(b) of the 2011 Act
- to state whether particular matters have come to my attention

Basis of independent examiner's report


My examination was carried out in accordance with the general directions given by the Charity Commission.

An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the next statement.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) Which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with section 130 of the 2011 Act and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act have not been met or
- (2) To which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.


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Name: Sue Asser

Relevant professional qualification or body: ~~None~~ M.A. (management) UKC

Address: 38 Bridge Down, Bridge, Canterbury, CT4 5AZ

Date: 31/01/2025