

WESTON-SUPER-MARE U3A

England & Wales - Charity number 1048773

Details

Other names THIRD AGE - WESTON, U 3 A WESTON

Status Registered

Legal form Other

Registered 1995-08-21

Register [View on the Charity Commission register](#)

Contact

Address Flat 11
Promenade House
57 Beach Road
Weston Super Mare
BS23 4AP

Phone 07479 549208

Email business.secretary@u3aweston.org.uk

Website www.weston.u3asite.uk

Activities

Objects: TO ADVANCE THE EDUCATION OF THE PUBLIC AND IN PARTICULAR THE EDUCATION OF MIDDLE AGED AND OLDER PEOPLE WHO ARE NOT IN FULL TIME GAINFUL EMPLOYMENT IN WESTON SUPER MARE AND ITS SURROUNDINGS

Activities: Weston U3A is a self help educational organisation for people no longer in full time employment in the Weston Super Mare Area.

Classification

- **How:** Provides Services
- **What:** Education/training, Arts/culture/heritage/science, Amateur Sport
- **Who:** Elderly/old People

Geography

- **Area of benefit:** IN PRACTICE WESTON SUPER MARE AND ITS SURROUNDINGS
- North Somerset

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£39,521	£43,680	-	-
2024-03-31	£33,886	£33,017	-	-
2023-03-31	£32,775	£31,476	-	-
2022-03-31	£23,353	£15,505	-	-
2021-05-31	£15,636	£15,636	-	-

Trustees

Name	Role	Appointed
June Tatch		2024-09-06
Maureen Chambers		2024-09-06
Maureen Tracy		2025-10-03
Pauline McAllister		2025-06-26
Shirley Harvey		2024-09-06
Simon Pratt		2024-09-06
Susan Purkis		2025-10-03

WESTON-SUPER-MARE U3A

England & Wales - Charity number 1048773

Accounts

CHAIRMANS REPORT TO 2025 AGM FOR WsM u3a 03/10/35

I have served my final year as Chairman, as under both the 9-year rule for Committee members and 3-year rule for Officers, I can no longer be part of the Committee.

The start of this year in September 2024 was difficult, we had a totally new constitution just accepted by that AGM, and –apart from two Officers, a totally new committee as well as the proposal to use Beacon, a totally new computer system,

Mike Lynham, stayed on as Secretary, and also for a while acted as Treasurer as we did not have one, as well as social treasurer. The two of us tried to give as much assistance to the new committee members as we could. Sadly, a few weeks in, Mike became seriously ill and had to resign everything to do with u3a. We are so pleased that, under the watchful and caring eye of his partner, Pamela, he is now – many months later, making slow but good progress – but he will not be taking on any sort of volunteer roles.

This left us without a Secretary and the committee were appreciative when June Tatch stepped up to take this on as Acting Secretary. A difficult role as without Mike to guide her she had little previous experience to assist her. The whole committee are happy with everything she has undertaken. June made it clear from the start that she did not wish to stand for this role but will continue with it until someone comes forward. Nobody actually nominated so this post stays open for this AGM, but it is thought that June is in talks with a member who may be willing to become our Secretary very shortly.

Without Simon Pratt not sure if we would have survived this transition year. Not only did he take on the whole concept, introduction and control of Beacon, and trained other committee members in its use, but he was also treasurer for much of the last year, as well as his own role as Membership Secretary. He has been very patient with other committee members, even when he has to repeat training on Beacon on several occasions. As we all start to use this more, the benefits of it are increasingly apparent. He now has the job of ensuring that all Group Leaders can access their own groups on it giving them a very easy way of emailing their members. Only in the past couple of months have we a new Acting Treasurer who will be standing for official election at the AGM.

As I had to undergo an operation during this last year, I was delighted to have a very supportive Vice--Chairman in Maureen Chambers. She has always been there to assist in all ways at the coffee mornings, etc.

Sheena Harris became our Social Treasurer, also present at every coffee morning handing, etc all the monies involved in the very many coach outings, trips and holidays organised by Weston u3a. Laura Woodward is our Welfare Officer who ensures that should any of our very large membership become ill or have any sort of medical treatment, they receive a Get Well Soon card from her on behalf of us all.

Chairmans Report for WsM u3a AGM (Page 2 of 2)

Shirley Harvey became the Lectures Co-ordinator (another role that Mike has fulfilled). She has speakers arranged for many months ahead and is always the person who opens up URC for the lectures and other events and ensures that refreshments are available. Very grateful for her work in this.

Jenny Schofield remains both as Groups Co-ordinator and also in charge of the Coach trips, theatre visits and holiday. Due to the 9-year rule she is unable to be a committee member, but does attend the meetings, to give her regular reports in person – then has to leave before the rest of the committee business takes place. She will issue a separate report to the AGM but has the heartfelt thanks from myself and the committee for her work in this. Other people do run some coach outings for WsM u3a, but the majority are organised by Jenny, and hundreds of our members experience her excellent organisation of these.

As with any volunteer organisation, there are always people who are the stalwarts. On behalf of us all we give our thanks to those who carry out the setting up, etc of the Friends Meeting House room, every Tuesday for the coffee morning, and those that 'man'; the tea/coffee urn there weekly also those who sit in the back room, particularly the Meeters and Greeters for people coming in to enquire about u3a.

We also have nearly eighty individual interest groups – and ALL of these have a Group Leader, who organises and run it. The Committee is delighted that Jenny Schofield is able to have a Thank You afternoon tea once a year for these very important members.

This new Committee welded itself together from the start, all very friendly and helpful to each other, although all feeling their way in their new roles. As all of them are willing to continue next year, along with newer people, I feel that I can step down and back knowing Weston-super-Mare u3a is left in very safe hands,

Within a week of this AGM, we will be holding our annual OPEN DAY, where we hope to be able recruit even more members.

It is important to clarify that no U3A in the United Kingdom operates as a branch; each U3A is an independent charity with its own governance. Even the Third Age Trust (TAT) serves only in an advisory capacity.

I am pleased that the membership has risen to around pre covid figures and apologise if I didn't welcome new members personally when you joined u3a,

I will pop into coffee mornings from time to time.

It is an honour to be on the committee but it has been even bigger honour to be chair.

IAN LUDBROOK

Weston-super-Mare U3A

Registered Charity No 1048773

Annual Report, Financial Statement and Statement of Assets and Liabilities for the year ending 31 March 2025

Independent Examiner's Report to the Trustees of Weston-super-Mare U3A

I report on the accounts of the Trust for the year ending 31 March 2025 which are set out on the following pages.

Respective responsibilities of Trustees and Examiner

As the Charity's trustees you are responsible for the preparation of the accounts. You are advised by the Third Age Trust that the audit requirements of section 43 (2) of the Charities Act 1993 (the Act) does not apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charities Commissioners under section 43 (7) (b) of the Act, 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 Commissioners. 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 I do not express an audit opinion on the view given by the accounts.

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 41 of the Act
and

to prepare accounts which accord with the accounting records and to comply with the
accounting requirements of the 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.

Signed:



J. M. HADDERNESS

Date: 15/8/2025

WESTON-SUPER-MARE U3A

England & Wales - Charity number 1048773

Accounts

Weston super Mare Annual Chairs Report

Good afternoon everyone and thank you again for coming today

After last year's AGM, the committee changed radically with Bob stepping down after 5 years as chairman and Nora resigning from her role as secretary after 6 years. Both led our u3a through the covid crisis.

I was elected chairman for a 2 year term with Jenny Schofield as my vice chair for a similar 2 year period.

Mike Lynham was elected secretary, with other committee members retaining their previous roles. Graham Rain resigned from the committee in January after 15 years as co-opted webmaster.

We have been reviewing how we perform our roles, following the Third Age Trust (TAT) descriptions, our constitution and TAT health check. We looked at adopting Beacon, a modern on-line integrated membership database to replace our 15 year old system. Several committee members did not want to change, but we will review our negative decision soon.

We have surveyed 52 relatively new members to find out why they joined, what they think of our u3a and what we can do to improve. Most (90%) think we're doing well. The survey (much more extensive than ever attempted before) also gave us information on attendance of groups, trips, lectures and coffee mornings.

All were pleased of the interest we were showing in their views and wanted to continue their membership. As a result, we have created a plan to improve and be "fit for the future".

We have produced a leaflet describing our u3a for members to give to friends who would benefit from joining our u3a. We believe our groups, trips, lectures and coffee mornings are a great way for local residents, no longer in full time employment to live, learn and laugh and meet new friends.

As you will see shortly, our finances are in an excellent position despite offering members a 6 month free membership extension, costing us £5000. However, we have made savings of nearly £2000/year by 4 members laying out the coffee morning tables and chairs, and by using local scouts to deliver our hardcopy newsletters. So we're using a local small company to print the newsletters and local scouts to distribute them, helping local organisations and keeping your money in Weston-super-Mare.

We fully recognise that our finances are members money, for which the committee are trustees under the charity acts.

We now have 890 members, 75 groups ranging in topics from Art appreciation to Yoga, via dance, books, poetry, sports and walking. Often our groups are oversubscribed and we

would welcome members to set up new groups. Our surveys showed languages, line dancing, quiz and art groups would be welcome.

Our holiday last year in Liverpool was very successful, as was our Turkey and Tinsel weekend in Torquay. We delivered 10 trips which were again oversubscribed and very much enjoyed by members.

We had 11 lectures on various topics, with John Crockford-Hawley talking of Royal Weston to 80 members, and John Penrose speaking of his daily life in Parliament attracting 68 members. Our coffee mornings generally host 30-40 members each Tuesday morning at 10am in the Friends Meeting House.

Looking ahead we welcome members who would like to join our committee, as again the charity Commissioner's encourage "churn" in trustees, to bring new ideas and vitality. The model constitution we adopted in item 2 will reinforce that, with committee tenure and role limits and several other changes.

We found out in April that we had an invalid constitution since the 2019 version did not follow Third Age Trust procedure, so the TAT model constitution was submitted to be approved by you to meet Charity law.

We already have speakers booked for 2025/6 lectures, and plans for trips and holidays, supported by hardworking group leaders and trip organisers.

In 3 weeks, we have a celebration of our achieving 30 years in Weston-super-Mare with a member sandwich tea, to which several dignitaries have accepted our invitation. We are evolving to be ready for the next 30 years!

I am pleased with the progress we have made in the last year, despite many difficult problems, and seek your acceptance by vote on this chairman's report.

SUMMARY

WESTON-SUPER-MARE U3A

FINANCIAL POSITION TOGETHER WITH INCOME AND EXPENDITURE FOR THE YEARS 2023-2024 & 2022-2023 (Financial Year ends 31st March)

INCOME	2023-2024	2022-2023	EXPENDITURE	2023-2024	2022-2023
Membership subscriptions paid	£7,316.00	£10,876.99	Hire of rooms for general U3A use	£2,545.50	£2,937.00
Lecture attendance income	£980.00	£667.39	Meetings' speakers fees or donations in lieu	£475.00	£394.00
Income from Groups	£21,854.60	£18,121.90	Hire of rooms for U3A Group meetings	£18,953.00	£18,173.65
Received for refreshments	£1,720.69	£1,420.18	Provision of refreshments at meetings	£721.45	£377.63
Diaries and Pens and Badges	£0.00	£15.00	Purchase of Printing, mailing and Stationery	£2,628.88	£2,564.80
Donations & Postage Contributions	£117.00	£150.00	Stamps	£675.00	£204.00
Gift Aid from HMRC	£1,252.52	£1,180.40	Equipment and Group Equipment	£242.50	£106.74
Grants	£35.00	£150.00	Licences Insurance and Website	£220.03	£275.39
Lloyds Bank interest	£106.12	£28.36	Regional expenses	£90.20	£45.40
Cambridge and Counties interest	£381.76	£164.41	Third Age Trust National Member Subscription	£3,608.00	£3,632.00
Net income from Social Account	£0.00	£0.00	Third Age Matters and Sources	£2,776.32	£2,555.93
Newsletter Sales	£122.00	£72.00	Miscellaneous	£80.75	£209.41
			Card Reader Commission	£9.23	n.a.
	£33,885.69	£32,846.63		£33,016.63	£31,475.95

ADJUSTED	FINANCIAL POSITION AT	31 MAR 2024	31 MAR 2023
	Lloyds Bank Current Account	£2,778.97	£2,768.72
	Lloyds Bank Social Account	£1,174.53	£800.00
	Lloyds Bank Business Instant Access	£15,500.00	£15,000.00
	Cambridge and Counties Bank	£16,987.07	£16,605.31
	2nd Class stamps in stock	£552.00	£140.00
	Cash Floats	£27.50	£27.50
	Inventory of Equipment	£4,245.00	£6,000.00
	TOTAL FUNDS	£41,265.07	£41,341.53
Fees due to Third Age Trust	due April National Membership Subscription	£4,184.00	£3,608.00
	due approx May Third Age Matters	£3,000.00	£2,776.32
Hall charges for this year not received	Hall charge invoices received pre-AGM	£5,176.60	£1,205.00
	Hall charge invoices not yet received by AGM (estimated)	£1,500.00	£6,000.00
	TOTAL COMMITMENT	£13,860.60	£13,589.32
	NET POSITION	£27,404.47	£27,752.21

Weston-super-Mare U3A

Registered Charity No 1048773

Annual Report, Financial Statement and Statement of Assets and Liabilities for the year ending 31 March 2024

Independent Examiner's Report to the Trustees of Weston-super-Mare U3A

I report on the accounts of the Trust for the year ending 31 March 2024 which are set out on the following pages.

Respective responsibilities of Trustees and Examiner

As the Charity's trustees you are responsible for the preparation of the accounts. You are advised by the Third Age Trust that the audit requirements of section 43 (2) of the Charities Act 1993 (the Act) does not apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charities Commissioners under section 43 (7) (b) of the Act, 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 Commissioners. 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 I do not express an audit opinion on the view given by the accounts.

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

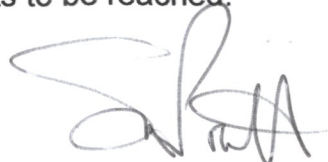
to keep accounting records in accordance with section 41 of the Act
and

to prepare accounts which accord with the accounting records and to comply with the
accounting requirements of the 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.

Signed:



Date:

14/9/24

WESTON-SUPER-MARE U3A

England & Wales - Charity number 1048773

Accounts

SUMMARY

WESTON-SUPER-MARE USA
INCOME AND EXPENDITURE

FOR THE YEARS ENDING 31 MAR 2023 & 31 MAR 2022

INCOME	2022-2023	2021-2022	EXPENDITURE	2022-2023	2021-2022
Membership subscriptions paid	£10,876.99	£10,776.00	Hire of rooms for general USA use	£2,937.00	£1,956.00
Lecture attendance income	£667.39	£314.00	Meetings' speakers' fees or donations in lieu	£394.00	£810.00
Income from groups	£18,121.90	£7,608.80	Hire of rooms for USA group meetings	£18,173.65	£5,801.30
Received for refreshments	£1,420.18	£801.10	Provision of refreshments at meetings	£377.63	£235.15
Bookstall income	na	na	Purchase of printing and stationery	£2,564.80	£1,156.74
Dishes and Pens and Bidges	£15.00	£37.00	Dishes and Pens	£56.25	£80.99
Donations & Postage Contributions	£150.00	£15.50	Stamps	£204.00	£132.00
Gift Aid from HMRC	£1,180.40	£1,103.55	Equipment	£106.74	£313.32
Loyds Bank interest	£28.36	£0.98	Licences Insurance and Website	£275.39	£212.09
Cambridge and Counties interest	£164.41	£196.05	Regional expenses	£45.40	£0.00
Net income from Social Account	£0.00	£2,300.00	Third Age Trust Capriphen	£3,632.00	£3,031.00
Newletter Sales	£272.00	£2,352.98	Third Age Matters and Sources	£2,559.93	£2,296.48
			Miscellaneous	£153.16	£79.50
				£31,475.95	£15,504.57

ADJUSTED FINANCIAL POSITION AT	31 MAR 2023	31 MAR 2022
Loyds Bank Current Account	£2,768.72	£2,935.46
Loyds Bank Social Account	£861.47	£816.77
Loyds Bank Business Intrust Access	£15,000.00	£13,500.00
Cambridge and Counties Bank	£16,605.31	£16,440.90
Pens and 2nd Class stamps in stock	£140.00	£300.00
Cash Floats	£27.50	£27.50
Inventory of Equipment	£6,000.00	£6,000.00
TOTAL FUNDS	£41,403.00	£40,020.63
April 2023	due	£3,608.00
May 2023	due	£2,534.40
Estimated Hall charges not yet received		£2,000.00
Hall change invoices already received by AGM date		£2,189.80
Estimated Hall changes not yet received		£1,622.60
TOTAL COMMITMENT	£19,747.20	£9,747.00
NET POSITION	£31,070.80	£30,273.63

TO BE APPROVED AT 2024 AGM

WESTON U3A ANNUAL GENERAL MEETING

Minutes of the Annual General Meeting held on 9th June 2023

1. **Attendees:** 88 members, Bob Charters in the Chair. All Committee Members were present. The Secretary confirmed that the AGM was quorate in accordance with our Constitution. The Chairman gave the statutory safety briefing. The Chairman outlined the programme for the afternoon which would be in three stages: the AGM business, a break for refreshments followed with a talk by Brian Duffy on the subject of "Tax, care and toyboys".
2. **Apologies:** 16
3. **Minutes of the AGM held on 10th June 2022:** The previous minutes were read by the Chair; approval was proposed by June Tatch and seconded by Gordon Hobbs. The minutes were unanimously approved by a show of hands and duly signed by the Chairman. The Chairman confirmed that all the referenced attachments would be included in the hard copy available for inspection in the Minutes Book in the FMH.
4. **Matters Arising:** There were no matters arising.
5. **The Chairperson's report was presented:** This report is attached at the end of these minutes. Approval was proposed by Gina Gaskill and seconded by Ian Ludbrook.
6. **Financial Report:** A consolidated set of accounts covering both the Financial and Social accounts are attached at the end of these minutes. These were presented by the Chairman on behalf of the Treasurer; approval was proposed by Nadine Kilvington and seconded by Margaret Gobby. It was commented that a card reader had been purchased which will be very useful when renewal of membership takes place.

Social Account. These were presented by our Social Accountant Don Jones who gave a very good report of the accounts, he also explained to the members how the accounts were handled with regard to trips and the holiday.
7. **Election of Rosie Evans to the Committee:** Following the resignation of our previous Cashier, Rosie Evans was elected onto the Committee. This was proposed by Ian Ludbrook and seconded by Chris Mingo-West, Rosie Evans was duly elected to the Committee by a unanimous show of hands.
8. **Appointment of Independent Examiner for the Accounts 2022/2023:** Simon Pratt conducted an independent examination of the 2022/2023 accounts and has volunteered to conduct the same review for 2023/2024. This was accepted by a show of hands.
9. **Re-election of retiring Committee Members.** There were 7 Committee members up for re-election; these were duly elected back on to the Committee and were proposed by Margaret Gobby and seconded by Gina Gaskill as follows:

Bob Charters, Nora Charters, Chris Mingo-West, Val Perrin, Sylvia Claridge,
Jenny Schofield and Mike Lynham

10. **Motions** There were no motions

There being no other business, the meeting closed at 1500 hrs.

Weston-super-Mare U3A

Registered Charity No 1048773

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Basis of Independent Examiner's Report

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Independent Examiner's statement

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and

to prepare accounts which accord with the accounting records and to comply with the
accounting requirements of the 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.

Signed:



Date:

14th July 2023

Weston-super-Mare University of the Third Age

Independent examiner

Social Account report for period 1 April 2021 to 31 March 2023

I have inspected the Income and Expenditure figures for the Social Activities and find that these are a correct summary of the information and figures given in the files and bank books.

Signed:

A handwritten signature in black ink, appearing to be 'J.P. A.' or similar, written in a cursive style.

Date:

14/7/23