

ANNUAL REPORT AND ACCOUNTS 2024/25 of the Great Glen U3A Interests Group

Registered Charity Number 1099411

1. Overview of Charity

The Great Glen U3A Interests Group was established in November 2001; it is affiliated nationally to the Third Age Trust (TAT). Nearly 30% of current members live in Great Glen, over 20% in Oadby, just under 20% in Wigston and 7% in Leicester with the remainder generally within five miles of the Great Glen/Oadby/Wigston boundary. Five percent live further away.

The Objects are:

the advancement of education, and in particular the education of older people and those retired from full time work, by all means including associated activities conducive to learning and personal development in Great Glen, Oadby, Wigston and surrounding areas.

Great Glen Oadby & Wigston U3A is one of some 1,000 u3as in the UK and one of about 20 in Leicestershire & Rutland. It is a self-help organisation.

2. Amalgamation

On 1 April 2024 the former Oadby & Wigston u3a amalgamated with Great Glen U3A Interests Group. Although the formal name of the amalgamated group is Great Glen U3A Interests Group, its working name is Great Glen Oadby & Wigston u3a. On 29 January 2025 a Special General Meeting resolved to adopt a new constitution for the amalgamated u3a. The new constitution for the combined u3a in most respects follows the 2021 national u3a template, which had been adopted by Oadby & Wigston u3a.

3. Committee Structure and Members, and in-year Changes

The Committee of Trustees meets on the first Tuesday in each month. The members at the year-end were Chairman: Robert Mansfield, Vice Chairman: Peter Williams, Groups Co-ordinator: Elizabeth Cooke, Treasurer: Roger Edwards, Business Secretary: Lynda Williams, Minutes Secretary: Kath Bailey, Membership Secretary: Janet Fanko, Newsletter Editor: June Juett. Co-opted member Noelene Sapiro (from March 2025). With sadness we record the death of Speaker Secretary Patricia Mansfield.

The Committee was supported by three non-Committee posts: Gift Aid Secretary Diane Richardson, Webmaster/Beacon Administrator Peter Russell and Speaker Finder Helen Snow.

4. Overview of Year

4.1 Membership

Membership has increased significantly from just over 400 members at the start of the year to 497 registered members at the end of March 2025. Of these 46 were members of the former Oadby & Wigston u3a. We had 118 new members join us. To enable more people to benefit from our group activities, we continued to set a reduced subscription for 37 Associates (full members of other u3as). The promotion of a discounted membership subscription, featured at the September Open Day held in the Great Glen Village Hall, again produced more recruits.

We also held pop-up displays on Oadby Parade and Tesco South Wigston, in August and October respectively. These raised our profile and directly recruited a handful of members.

4.2 Venues

Our prime venue for indoor meetings continues to be the rooms at the Great Glen Methodist Church. Burton Overy Village Hall provides the venue for two dance groups. Wigston Liberal Club is used by New Age Kurling and a second speaker meeting, and the Menphys Hub South Wigston is used by four groups. Our two table tennis groups continued at Leicester University Sports Centre and were joined by Pickleball in 2025. A private room at The Fox Pond Inn was used by three interest groups until the end of March 2025, when the facility was closed for refurbishment. Carpet Bowls returned to meeting at the re-opened Great Glen Village Hall though most of 2024-25.

4.3 New Interest Groups

At the year-end we had 43 interest groups. Newly established groups were: New Age Kurling in Wigston, Line Dancing Beginners in South Wigston, Pickleball in Oadby and Chat at Chestnuts (coffee shop) in Oadby.

4.4 Existing Interest Groups

The Classic Car Group closed in 2025. Several of our groups are over-subscribed and have waiting lists, including: Psychology, Friday Table Tennis, Carpet Bowls, New Age Kurling, MiniBridge, Village Strollers and Pickleball.

4.5 Website

We adopted the SiteWorks website promoted by the Third Age Trust during the summer. This involved a rewrite of most of our website content. We added video images for some of our active groups. We are now more easily able to add events, details about groups, leader contact details and venue descriptions. Our Webmaster has delivered training to our Group Leaders, so we now have a large group who are able to update the website.

4.6 Life Membership & Outstanding Achievement Award

In summer 2024 we were pleased to award Life Membership to Patricia Mansfield and to confer an Outstanding Achievement Award on Liz Adams.

4.7 Community Activities

We occasionally lend our equipment to assist other community groups in Great Glen and there is no charge for this.

5. Overview of Finance

Great Glen Oadby & Wigston u3a received total annual subscriptions from members of £.6.5K. Our sessional income returned to close to pre-pandemic levels. Our total income was just over £32K. The cost of the TAT magazine went up to £4 per member for a full year.

We had in total a significant surplus from our activities, so that reserves at the 2024/25 year-end amounted to just under a full year's turnover. After consideration of uncertainties in the financial outlook, our aim is to bring about some reduction in the level of reserves through sustainable action.

We therefore reduced the full membership fees from 2025-26 and our intention is to maintain this level for several years.

6. Governance

The Committee members are Trustees and meet every month; most Trustees attended every meeting. The Trustees reviewed the risk register in January and concluded that the arrangements in place for risk management were adequate and appropriate for a charity of our size.

We invite prospective Trustees to attend one or two meetings of the Committee as observers before seeking nomination. At the beginning of 2025, we welcomed Noelene Sapiro as a co-opted Trustee.

We continue to use The Third Age Trust's membership, group administration and finance system for u3as (known as BEACON). We have used this to maintain contact with members.

Minor changes were made to our Group Leaders' Handbook in March, mainly to cater for additional venues and updates to policies.

6. Accounts for the year ending 31 March 2025

	2024-25	2023-24		2024-25	2023-24
INCOME	(£000)	(£000)	EXPENDITURE	(£000)	(£000)
Membership	6.5	5.3	Rent	19.0	11.4
Income from Groups	20.0	14.3	Third Age Trust Membership & Magazine	2.3	1.9
Gift Aid	3.0	2.4	Running costs	5.9	5.1
Outings	0.5		Outings	0.5	
Other	2.0	0.9			
TOTAL	32.0	22.9	TOTAL	27.7	18.4
Actual	£4,313	£4,494			

Surplus					
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Income from groups rose by nearly a third as most groups recruited extra members, we also added three new groups. Rental payments went up significantly, particularly as additional charges were incurred for the venues used by the former Oadby & Wigston u3a and the re-opened Great Glen Village Hall. As some groups were now too large for the free rooms, we paid rent for two groups at the Menphys Hub. We received a small amount from the Oadby & Wigston BC lottery. We received just over £1,000, the closing balance from O&W u3a, which is included as other income. The Balance Sheet shows £27,150 in the bank, including £4,685 of prepaid subscriptions. We reviewed our financial controls in January and concluded that these were appropriate for our u3a.

Robert Mansfield Chairman
15 April 2025

Roger Edwards Treasurer

Income & Expenditure Account

Year ending Year ending
31st March 2023 31st March 2024

Income		£	£	£
Donations		20077	14,329	11474
Gift Aid		2987	2,409	1452
Interest		734	377	60
O&W Lottery		100	0	
Other income		1152	469	699
Outings Income		525	0	
Subscriptions		6480	5264	4545
Total income		32,054	22,848	18,231
Expenditure				
Equipment		1256	1143	1044
IT Services		1118	1030	993
Levy - 3rd Age Trust		1616	1268	1248
Magazine - Third Age Trust		635	634	607
Newsletter Costs		152	122	337
Outings		520		
Refreshments		954	847	266
Rent		18943	11394	10230
Speaker fees		1317	720	595
Sundry expenses & Books for sale		108	277	193
U3A Expenses		1124	921	534
Total expenditure		27,742	18,355	16,046
Excess of income over expenditure		4,312	4,494	2,186
Funds Statement as at 31st March				
Funds at the beginning of the year		18,153	13,659	11,473
Excess of income over expenditure		4,312	4,494	2,186
Funds at the end of the year		22,465	18,153	13,659
Represented by :-				
Balance at bank	Bath Building So	10,304	8,054	5,883
	CAF Bank	5,210	5,695	6,261
	United Trust Bar	11,569	9,156	5,000
Cash in hand	Floats	68	30	30
		27,150	22,935	17,174
Less Prepayments		(4,685)	(4,782)	(3,515)
		22,465	18,153	13,659

I have examined the above Accounts and
confirm they are in accordance with the records presented

Roger W Edwards - Hon Treasurer

Mike Snow - Independent Examiner

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