

EVESHAM AND DISTRICT U3A

England & Wales · Charity number 1101530

Details

Status Registered

Legal form Other

Registered 2004-01-14

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

Contact

Address 3 Ivy Court
Elm Road
Evesham
Worcestershire
WR11 3DR

Phone 0138647009

Website <https://evesham.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: 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, in Evesham and its surrounding locality.

Classification

- **How:** Sponsors Or Undertakes Research
- **What:** Education/training, Arts/culture/heritage/science, Amateur Sport, Environment/conservation/heritage, Recreation
- **Who:** Elderly/old People

Geography

- **Area of benefit:** EVESHAM
- Worcestershire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£69,517	£65,899	-	-
2024-03-31	£55,587	£54,763	-	-
2023-03-31	£52,850	£53,148	-	-
2022-03-31	£33,780	£30,737	-	-
2021-03-31	£11,540	£12,371	-	-

Trustees

Name	Role	Appointed
Roslyn Janet Gowers	Chair	2022-07-06
Alan Chambers		2023-07-05
Catherine Patricia Cox		2023-07-05
Claire Avril Jeannette Henderson		2025-03-17
David Charles Daniels		2025-04-14
Diane Mary Nicholls		2023-07-05
Helen Hutt		2024-06-17
Lorna Slaughter		2025-03-17

EVESHAM AND DISTRICT U3A

England & Wales - Charity number 1101530

Accounts



Trustees' Annual Report for the period

Period start date: 01 April 2024
 Period end date: 31 March 2025
 From To

Section A Reference and administration details

Charity name: Evesham and District u3a

Other names charity is known by:

Registered charity number (if any): 1101530

Charity's principal address: 20 St Luke's Close
 Evesham
 Postcode: WR11 2ET

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	Deborah Andrews	Chair	01/04/24 to 04/06/24	
2	John Boon	Vice Chair	01/04/24 to 04/06/24	
3	Diane Nicholls	Treasurer		
4	Alan Chambers	Secretary		
5	Nicola Neill		01/04/24 to 04/06/24	
6	Amarjit Marwaha			
7	Roslyn Gowers	Vice Chair/Chair		
8	Victoria Law		01/04/24 to 02/08/24	
9	Catherine Cox			
10	Alison Williams		01/04/24 to 04/06/24	
11	Tony Powell	Vice Chair	05/06/24 to 31/03/25	
12	Karen Purves	Chair	05/06/25 to 09/08/25	
13	Helen Hutt		05/06/24-31/03/25	
14				
15				
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19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document <i>(eg. trust deed, constitution)</i>	Constitution
How the charity is constituted <i>(eg. trust, association, company)</i>	Unincorporated members' association and a member of Third Age Trust
Trustee selection methods <i>(eg. appointed by, elected by)</i>	Elected at Annual General Meeting

Additional governance issues (Optional information)

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

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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Section C Objectives and activities

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

The charity's object is 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 the Evesham area and its surrounding locality.

Advancement of education of older people as part of the u3a movement. The u3a movement is a collection of groups that run local and online led learning for those no longer in full-time work across the United Kingdom. Evesham and District u3a is all voluntary and has over 90 activity groups covering many subjects from art appreciation to yoga, it is local, social friendly, low cost and open to all who are retired or semi-retired.

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)

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

Over the course of this year, the U3A has seen significant changes nationally with the adoption of a new Constitution and structure and the election of both a new Board and a new Council, together with new Officers in many of the roles. The Committee has contributed to the discussions about these changes and voted in every election and are now taking part in discussions with the new West Midlands Regional Representative to ascertain how they can support us locally to develop what we offer here in Evesham.

The Evesham Committee have had another busy year – we have seen our membership continue to grow (currently at 1145) and the number of groups who operate under our banner also grow to 91. Sadly, we have also seen a few groups unable to continue because no Group Leader has stepped forward when someone has retired. But we hope to be able to address this in future with the creation of a small team of Group Leader Mentors – experienced Group Leaders who have agreed to offer support to other groups where there is a Leader vacancy, where the group is new or where the Group wishes to change focus. We are delighted to have had 6 Mentors offer their time and experience in this way and hope it will prove a successful way forward.

The Committee have focussed on some key priorities during the year – firstly to reassess our Governance procedures, especially around finance, to ensure they meet expected standards from both the Third Age Trust and the Charity Commission. Secondly to improve communication and transparency between Committee and Membership and thirdly to mount a recruitment drive to bring more people on to the Committee and to create a proper succession plan so that we are not left again, as we were this year, with most of our key roles being held by people without previous experience.

In financial matters we have updated our procedures for taking group payments and paying for hall hire to keep us in line with TAT requirements. To simplify our accounts, we have changed the timing of our financial year start from November to April, giving an additional one-off 5 months' free membership for existing members.

Work to improve our application process is ongoing and we aim to have online applications available soon. Payment processes have also been updated with most members now being able to pay online via the PayPal system or via a BACS payment, considerably reducing the time needed to process payments and manage banking transactions. All this work goes to making our branch 'fit for the future' alongside the main u3a structure.

As part of our aim to improve communication with members we have agreed to post Committee Agendas and Minutes on the u3a website, where any of you can see what we have been discussing and deciding. We are happy to receive feedback on anything in those minutes or to take items for future agendas. We have also issued a standing invitation to any member who wishes to observe any Committee meeting. This year we held our first Group Leaders' Meeting with another due in September. For most of this year the Committee has functioned with just seven members, too few to efficiently manage the workload, with some Committee members holding more than one required role. In addition, there is little room for supporting people to develop their skills ready to take on any of the four Officer positions which are required for us to continue to function as a u3a.

Section E

Financial review

Brief statement of the charity's policy on reserves

The Trustees have agreed that 50% of the annual expenditure is required to be held in Reserves. Reserves are needed to ensure continuity in the event of a sudden drop in income or increase in expenditure, to replace assets, to cover future demands and to deal with any emergency. Methods to reduce the level of reserves above this amount should further charitable objective of our u3a in a way that benefits as many members as possible, e.g. through the purchase of equipment or a temporary freeze, or reduction in membership subscriptions

Details of any funds materially in deficit

N/A

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.

The charity's principal source of funds is membership and subscription

Section F

Other optional information

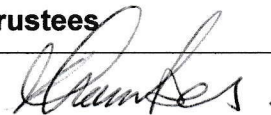
Section G

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)

Alan Chambers

Position (eg Secretary, Chair, etc)

Secretary

Date

19/7/2025

Evesham u3a					
Statement of Accounts: all accounts					
Income & Expenditure, 1st April - 31st March					
	<i>Financial year</i>	<i>2024/2025</i>		<i>2023/2024</i>	
<i>Category</i>	<i>In</i>		<i>Out</i>	<i>In</i>	<i>Out</i>
Admin - Membership			310.18		£ 207.90
Admin - Misc	£ 112.50		£ 146.49	£ 0.98	£ 31.99
Admin - Stationery			£ 68.00		
Beacon Access			£ 1,022.00		£ 974.00
CLA licence			£ 67.21		£ 64.20
Cotswold Link			£ 79.20		£ 177.55
Donations	£ 68.50			£ 9.48	
Grants To Groups			£ 50.00		£ 231.29
Groups (Pickleball)	£ 4,758.00		£ 4,290.00		
Income from groups	£ 16.95			£ 90.38	
Local Newsletter Printing/Postage			£ 2,228.85		£ 2,876.78
Meetings - New Mem&GpLead			£ 385.00		
Meetings - Refreshments			£ 50.55		£ 67.69
Meetings - Speakers			£ 547.50		£ 609.48
Meetings - Venue Hire			£ 485.00		£ 381.00
Membership	£ 13,848.75			£ 12,583.50	£ 45.50
Open Day			£ 567.04		£ 489.70
PayPal commission			£ 148.41		£ 169.06
sumup Commission			£ 21.66		£ 13.80
TAM postage	£ 326.88		£ 2,533.84		£ 2,734.95
TAT Mem Fee-Capitation			£ 3,768.00		£ 3,608.00
Sub-totals	£ 19,131.58		£ 16,768.93	£ 12,684.34	£ 12,682.89
Concert Group	£ 24,142.95		£ 21,643.53	£ 15,778.60	£ 14,864.12
Other Groups	£ 26,242.25		£ 27,486.50	£ 27,124.79	£ 27,216.99
Total	£ 69,516.78		£ 65,898.96	£ 55,587.73	£ 54,764.00
Brought Forward		£ 24,371.85		£ 23,548.12	
Total Income		£ 69,516.78		£ 55,587.73	
Total Expenditure		£ 65,898.96		£ 54,764.00	
Balance End of Year		£ 27,990.57		£ 24,371.85	
Balance Sheet					
Current Account		£ 25,114.20		£ 20,251.08	
Groups Balance		£2,876.37		£ 4,120.77	
Total		£27,990.57		£ 24,371.85	
Note					
1. Pickleball new group					
included in current account this year					



Section A Independent Examiner's Report

Report to the trustees

Charity Name
EVESHAM & DISTRICT USA

On accounts for the year ended

31ST MARCH 2025	Charity no (if any)	1101530
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Set out on pages

remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 03 2025

Responsibilities and basis of report

As the charity's trustees, 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 Trust'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 Commission under section 145(5)(b) of the Act.

Independent examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. *Delete [] if not applicable.*

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

* Please delete if not applicable

EVESHAM AND DISTRICT U3A

England & Wales - Charity number 1101530

Accounts

Trustees' Report 2023-2024

The last year continued to be a busy year for Evesham & District u3a. Our membership numbers remain buoyant with over 1000 members including associate members. Visiting members from Cotswold Link u3a groups continue to attend an Evesham group as per the Cotswold Link agreement. It is a great benefit to all of our members as it opens a great many more interest groups across the region. This year we have benefitted from advice from fellow officers across the link. In addition, we hosted the March annual general meeting which was held at Honeybourne Village Hall.

Inevitably, some interest groups have ceased to exist during this year but have quickly been replaced by others. Some groups have developed 2nd or 3rd groups to cope with numbers and the Concert Group has occasionally had to hire a second coach to transport concert goers to the Symphony Hall. There are also a number of groups which have started this year or are preparing to start. Some groups are running with small waiting lists and the Groups' Coordinator continues to monitor the situation and support group leaders where necessary.

Our annual Open Day was held in November at All Saints Church and only happens due to hard work by both committee members and our non-committee 'experts'. It continues to be an important shop window for our organisation. This year we asked attendees where they had learned about u3a and the Open Day and despite advertising in local press and magazines, word of mouth and seeing the banners in town were the most common answers.

Financial transactions have continued to be more and more complicated as the face of banking changes. We have continued to encourage our members to pay using online facilities, but we understand that some of our members prefer not to. However, paying by cheque, and more especially cash, are beginning to get more difficult. Venues are also beginning to refuse cash and cheque payments which makes life difficult for some groups. This will be the focus of the finance sub-committee in the coming year.

This year the website has changed. Evesham has been in the trial group for this new website and we could only do that because we have a very skilled and hard-working website team had what turned out to be almost a full-time job setting it up. The website is now much more attractive, professional and easy to use.

The committee continues to meet on a monthly basis at Richmond Villages Wood Norton. Four members are standing down in the coming year which will leave the committee short of volunteers. We will continue to contact members regarding joining the committee and look forward to hearing from willing members so that we can continue to benefit from all that our u3a can offer.

Although some costs have risen this year, we are proposing to keep our subscriptions at the same level. We expect the Third Age Trust to increase their costs over the coming year before the next AGM.

Deborah Andrews 02.05.24

Evesham and District U3A					
Financial Statement at 31 March 2024					
<i>Printed 2nd May 2024 13:07</i>					
Income & Expenditure, 1st April - 31st March					
<i>Financial Year</i>	2023/24		2022/2023		
<i>Category</i>	<i>In</i>	<i>Out</i>	<i>In</i>	<i>Out</i>	
Admin - Membership		£ 207.90		£ 129.20	
Admin - Misc	£ 0.98	£ 31.99		£ 223.77	
Beacon Access		£ 974.00		£ 1,015.00	
CLA licence		£ 64.20			
Cotswold Link		£ 177.55			
Donations	£ 9.48		£ 72.50		
Gift Aid Reclaim			£ 1,289.07		
Grants To Groups		£ 231.29		£ 50.00	
Income from groups	£ 90.38				
Local Newsletter Printing		£ 2,876.78		£ 3,938.02	
Meetings - Refreshments		£ 67.69		£ 62.06	
Meetings - Speakers		£ 609.48		£ 692.20	
Meetings - Venue Hire		£ 381.00		£ 456.30	
Membership	£ 12,853.50	£ 45.50	£ 12,387.50	£ 26.00	
Misc			£ 81.00	£ 14.00	
Open Day		£ 489.70	£ 150.00	£ 598.59	
Outings Group			£ 5,822.00	£ 5,780.90	
PayPal commission		£ 169.06	£ 0.01	£ 174.86	
sumup Commission		£ 13.80			
TAM postage		£ 2,734.95		£ 2,188.16	
TAT Mem Fee-Capitation		£ 3,608.00		£ 3,804.00	
U3A External Meetings				£ 30.00	
Sub-totals	£ 12,684.34	£ 12,682.99	£ 13,866.01	£ 13,182.16	
Outings and Concert Group	£ 15,778.60	£ 14,864.12	£ 13,867.00	£ 14,887.68	
Other Groups	£ 27,124.79	£ 27,216.99	£ 25,117.03	£ 25,077.74	
Brought Forward				£ 23,548.12	£23,845.66
Total Income				£ 55,587.73	£52,850.04
Total Expenditure		£ 20,251.08		£ 54,764.00	£53,147.58
Total at end of year				£ 24,371.85	£23,548.12
Balance Sheet					
Current Account				£ 20,251.08	£19,355.15
Groups Balance				£ 4,120.77	£4,212.97
Total				£ 24,371.85	£23,548.12



Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name
EVESHAM AND DISTRICT USA.

On accounts for the year ended

31-03-2024 Charity no (if any) 1101530

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended DD / MM / YYYY.

Responsibilities and basis of report

As the charity trustees of the Trust, 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 Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

* Please delete the words in the brackets if they do not apply.

Signed: Carla Auger

Date: 02/05/2024

Name: CARLA AUGER

Relevant professional qualification(s) or body (if any):

INDEPENDENT FINANCIAL EXAMINER (AND TRAINER) FOR WORCESTERSHIRE FEDERATION OF WOMENS INSTITUTES CIO

Address:

6 TAMAR PLACE
EVESHAM
WR11 3FD.

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

MINOR DISCREPANCIES - TALKED OVER WITH TREASURER.
GOOD CLEAR ACCOUNTS!

EVESHAM AND DISTRICT U3A

England & Wales - Charity number 1101530

Accounts



Trustees' Annual Report for the period

	Period start date	Period end date
From	01 April 2022	To 31 March 2023

Section A Reference and administration details

Charity name Evesham and District u3a

Other names charity is known by

Registered charity number (if any) 1101530

Charity's principal address c/o Mr C Wolstencroft, 2 Highfield Road, Hampton, Evesham

Postcode WR11 2PU

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	Deborah Andrews	Chair		
2	Christopher Wolstencroft	Vice Chair		
3	David Keeling	Treasurer		
4	Alison Williams	Secretary		
5	Nicola Neill			
6	John Boon			
7	Roslyn Gowers			
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Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Section B Structure, governance and management

Description of the charity’s trusts

Type of governing document <i>(eg. trust deed, constitution)</i>	Constitution
How the charity is constituted <i>(eg. trust, association, company)</i>	Unincorporated members’ association and a member of Third Age Trust
Trustee selection methods <i>(eg. appointed by, elected by)</i>	Elected at Annual General Meeting

Additional governance issues (Optional information)

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

- policies and procedures adopted for the induction and training of trustees;
- the charity’s organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees’ consideration of major risks and the system and procedures to manage them.

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Section C Objectives and activities

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

The charity’s object is 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 the Evesham area and its surrounding locality.

Advancement of education of older people as part of the u3a movement. The u3a movement is a collection of groups that run local and online led learning for those no longer in full-time work across the United Kingdom. Evesham and District u3a is all voluntary and has over 80 activity groups covering many subjects from art appreciation to yoga, it is local, social friendly, low cost and open to all.

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)

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

Evesham and District u3a is back to full strength in terms of activities and membership numbers after the reduced activity during the Covid pandemic. We are proud of the number of interest groups available for our members. They range from small self-guided learning groups, like Welsh, to large excursion groups like the concert group which regularly takes a coach full to The Symphony Hall in Birmingham. The interest groups allow many of us to undertake activities we wouldn't otherwise be able to. Groups are now meeting as usual, although some still use online facilities adopted during the pandemic if the need arises – this includes your committee, who have held hybrid meetings when a member is unable to meet face to face.

In November, we held our Open Day – once again in All Saints' Church. This was an extremely successful event and most groups were represented. The event was attended by existing members who come to see what is on offer and to renew their membership and those who wish to join for the first time. We are extremely grateful to committee members and others who work hard to put on this event every year and to group leaders and their representatives who put on displays.

The committee continues to meet monthly at Richmond Villages Wood Norton and we are grateful to the management for their generous offer of the extremely comfortable meeting rooms there. To cope with problems arising from the Covid pandemic, we established two new sub committees – Group Support and Recruitment and Retention. We have judged these no longer needed and they have therefore been disbanded. One of our committee members is taking on the job of Group Support. The Finance subcommittee will, of course, continue. They have updated the Finance Policy, which can be found on the website, and submitted a budget and Finance Strategy to the full committee. Their recommendation this year is that there should be no increase to our annual subscription.

We have held a number of coffee mornings with group leaders to update them on the use of Beacon which they can use to keep their membership lists and for keeping financial records – which makes the financial submission at the end of the year far easier.

We also discussed Risk Assessments, insurance and the new safeguarding policy in this meeting and hope all who attended these meetings feel confident to put together a simple risk assessment for their group.

The website team have had to deal with some difficult situations when the national system went down completely for some considerable time. The committee is grateful for their work in trying to keep everything going. They are now immersed in the change to a new system, which should give us a better looking and easier to use website.

Section E Financial review

Brief statement of the charity's policy on reserves

The Trustees have agreed that 50% of the annual expenditure is required to be held in Reserves. Reserves are needed to ensure continuity in the event of a sudden drop in income or increase in expenditure, to replace assets, to cover future demands and to deal with any emergency. Methods to reduce the level of reserves above this amount should further charitable objective of our u3a in a way that benefits as many members as possible, e.g. through the purchase of equipment or a temporary freeze, or reduction in membership subscriptions

Details of any funds materially in deficit

N/A

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.

The charity's principal source of funds is membership and subscription

Section F Other optional information

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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)

Alan Chambers

Position (eg Secretary, Chair, etc)

Secretary

Date

21/11/23



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name

EVESHAM & DISTRICT USA.

On accounts for the year
ended

31-3-2023

Charity no
(if any)

1101530

Set out on pages

1-3

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended DD / MM / YYYY.

Responsibilities and
basis of report

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

I report in respect of my examination of the Trust'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 Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect,:

- the accounting records were not kept in accordance with section 130 of the Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

* Please delete the words in the brackets if they do not apply.

Signed:

Carla J Auger.

Date:

19-06-2023

Name:

CARLA AUGER

Relevant professional
qualification(s) or body
(if any):

INDEPENDENT FINANCIAL EXAMINER
FOR WORCESTERSHIRE FEDERATION OF WLS.

Address:

6 TAMAR PLACE

EVESHAM

WR11 3FD

Section B

Disclosure

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here details of any items that the examiner wishes to disclose.

C

EVESHAM & DISTRICT u3a						
Financial Statement as at 31 March 2023						
	2022-23			2021-22		
	In		Out	In		Out
Admin Expenses			352.97			403.90
Bank Deposit Interest	0.00			0.26		
Beacon access			1,015.00			891.00
Capital Equipment			0.00			103.99
Donations	72.50			30.10		
Gift Aid	1,289.07			1,194.54		
Grants to Groups			50.00			67.83
Income from closed groups	105.93					
Local newsletter printing & distribution			3,938.02			2,172.24
Meetings – venues & speakers			1,148.50			713.00
Meetings – Open Day			448.59			464.85
Meetings – Refreshments			62.06			0.00
Meetings – Zoom			0.00			158.27
Membership	12,361.50			10,303.00		
Miscellaneous	37.00		0.00			33.84
National Newsletter postage			2,188.16			1,744.68
Paypal Commission	0.01		174.86	0.00		156.40
TAT Membership fee (capitation)			3,804.00			2,964.50
Sub – total	13,866.01		13,182.16	11,527.90		9,874.50
Outings and Concert Groups	13,867.00		14,887.68	6,362.00		5,119.70
Other groups' income & expenditure	25,117.03		25,077.74	15,890.45		15,743.35
Total	52,850.04		53,147.58	33,780.35		30,737.55
Brought forward		23,845.66			20,802.86	
Total income		52,850.04			33,780.35	
Total expenditure		53,147.58			30,737.55	
Total at end of year		23,548.12			23,845.66	
Current Account		19,335.15			16,068.68	
Groups' balances		4,212.97			4,173.68	
Outings & Concert Groups' bank balance		0.00			3,603.30	
Total at end of year		23,548.12			23,845.66	



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name

EVESHAM & DISTRICT USA.

On accounts for the year
ended

31-3-2023

Charity no
(if any)

1101530

Set out on pages

1-3

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended DD / MM / YYYY.

Responsibilities and
basis of report

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

I report in respect of my examination of the Trust'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 Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect,:

- the accounting records were not kept in accordance with section 130 of the Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

* Please delete the words in the brackets if they do not apply.

Signed:

Carla J Auger.

Date:

19-06-2023

Name:

CARLA AUGER

Relevant professional
qualification(s) or body
(if any):

INDEPENDENT FINANCIAL EXAMINER
FOR WORCESTERSHIRE FEDERATION OF WLS.

Address:

6 TAMAR PLACE

EVESHAM

WRI1 3FD

Section B

Disclosure

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here details of any items that the examiner wishes to disclose.

C

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	In		Out	In		Out
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Beacon access			1,015.00			891.00
Capital Equipment			0.00			103.99
Donations	72.50			30.10		
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Grants to Groups			50.00			67.83
Income from closed groups	105.93					
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EVESHAM AND DISTRICT U3A

England & Wales - Charity number 1101530

Accounts



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	April	2021		31	Mar	2022

Section A Reference and administration details

Charity name Evesham & District u3a

Other names charity is known by

Registered charity number (if any) 1101530

Charity's principal address c/o Mr C Wolstencroft, 2 Highfield Road, Hampton, Evesham

Postcode WR11 2PU

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	Deborah Andrews	Chair		
2	Christopher Wolstencroft	Vice Chair		
3	David Keeling	Treasurer		
4	Alison Williams	Secretary		
5	Nicola Neill			
6	John Boon			
7	Sue Beneke			
8	Jeff Berliner		2 June 2021 – 6 January 2022	
9				
10				
11				
12				
13				
14				
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16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

--

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Unincorporated members' association and a member of the Third Age Trust
Trustee selection methods (eg. appointed by, elected by)	Elected at Annual General Meeting

Additional governance issues (Optional information)

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

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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Section C Objectives and activities

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

The charity's object is 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 Evesham and its surrounding locality

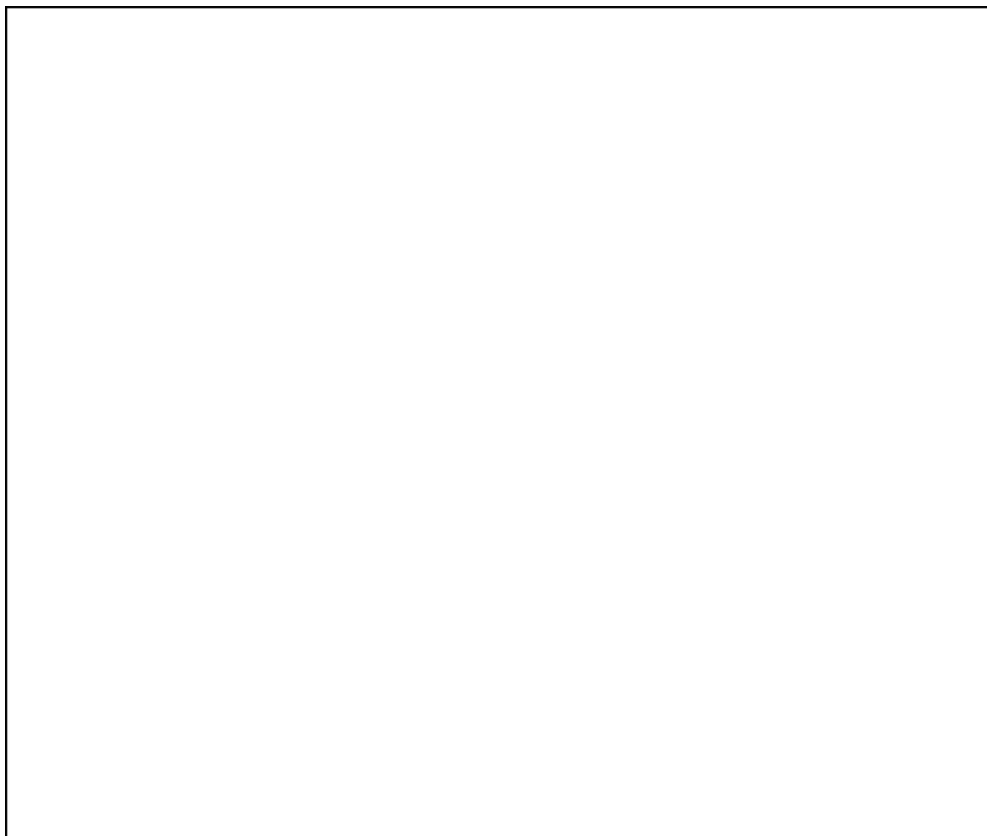
Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Advancement of education of older people as part of the u3a movement. The u3a movement is a collection of groups that run local and online member led learning for those no longer in full time work across the United Kingdom. Evesham and District u3a is all voluntary and has over 80 activity groups covering many subjects from art appreciation to yoga. It is local, social, friendly, low cost and open to all.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.



Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

In the past year life has slowly started to get back to normal following the COVID pandemic. Despite continuing restrictions, interest groups started meeting in person – many after several months of meeting on Zoom. Although we were glad to get back to meeting face to face, our new-found technical ability has meant we have continued to use Zoom to support our group meetings. Monthly meetings are currently hybrid and we have discovered we can use technology to support members who are unable to attend meetings in person – not just because of COVID. The committee is hugely grateful to group leaders for all they have done to get their groups up and running again.

In November, we ran a successful open day in a new venue – All Saints' Church. Although some groups were unable to be present due to COVID restrictions, we filled the church with people and interesting displays. As a result, we recruited many new members – some returners and some new to u3a. Our membership is now up to pre COVID levels. We have some new groups which have proved immensely popular. We have a list of potential interest groups, and we would like to see them up and running this year.

The committee continues to meet monthly and Richmond Villages Wood Norton have kindly allowed us to use one of their meeting rooms. We have established three subgroups to enable us to work more efficiently: Finance, Recruitment and Retention and Group Support.

Section E

Financial review

Brief statement of the charity's policy on reserves

The Trustees have agreed that 50% of the annual expenditure is required to be held as Reserves. Reserves are needed to ensure continuity in the event of a sudden drop in income or increase in expenditure, to replace assets, to cover future equipment demands and to deal with any emergency. Methods to reduce the level of reserves above this amount should further the charitable objectives of our u3a in a way that benefits as many members as possible, e.g. through the purchase of equipment or a temporary freeze of, or a reduction in, membership subscriptions.

Details of any funds materially in deficit

N/A

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.

The charity's principal source of funds is membership subscriptions

Section F Other optional information

[Empty box for 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)	Alison Williams	
Full name(s)	Alison Williams	
Position (eg Secretary, Chair, etc)	Secretary	
Date	15/09/22	



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
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Section A Reference and administration details

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Name	Dates acted if not for whole year

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Type of adviser	Name	Address

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Details of any funds materially in deficit

N/A

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.

The charity's principal source of funds is membership subscriptions

Section F Other optional information

[Empty box for 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)	Alison Williams	
Full name(s)	Alison Williams	
Position (eg Secretary, Chair, etc)	Secretary	
Date	15/09/22	



Section A Independent Examiner's Report

Report to the trustees/ members of

Charity Name: EVESHAM & DISTRICT USA

On accounts for the year ended

31 MARCH 2022 Charity no (if any): 1101530

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2022.

Responsibilities and basis of report

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

I report in respect of my examination of the Trust'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 Commission under section 145(5)(b) of the Act.

Independent examiner's statement

~~The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]. Delete [] if not applicable.~~

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect,:

- the accounting records were not kept in accordance with section 130 of the Act; or
the accounts did not accord with the accounting records; or
the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

* Please delete the words in the brackets if they do not apply.

Signed: [Signature]

Date: 4-11-22

Name: CLIVE ALLEN

Relevant professional qualification(s) or body (if any):

N/A | 2 VALLEY VIEW, GREAT HILL HARWINGTON EVESHAM WILTS