



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

Other names charity is known by

Registered charity number (if any)

Charity's principal address

Postcode

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	
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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 (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

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



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Details of any funds materially in deficit

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Further financial review details (Optional information)

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The charity's principal source of funds is membership subscriptions

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)	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 U3a

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:

Date:

4-11-22

Name:

CLIVE ALLEN

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

} N/A | 2 VALLEY VIEW, CREST HILL
HARWINGTON EVESHAM WILSONS