



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				
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)

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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 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 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

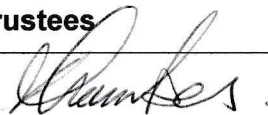
Section G

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

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