

UNIVERSITY OF THE THIRD AGE, TODMORDEN

England & Wales · Charity number 1145937

Details

| | |
|-------------|---|
| Other names | U3A TODMORDEN |
| Status | Registered |
| Legal form | Other |
| Registered | 2012-02-16 |
| Register | View on the Charity Commission register |

Contact

| | |
|---------|--|
| Address | c/o The Fielden Centre Ewood Lane Todmorden OL14 7DD |
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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.

Classification

- **How:** Provides Services, Acts As An Umbrella Or Resource Body
- **What:** Education/training, Arts/culture/heritage/science, Recreation
- **Who:** Elderly/old People

Geography

- Calderdale

Finances

| Period end | Income | Expenditure | Assets | Employees |
|------------|---------|-------------|--------|-----------|
| 2025-04-30 | £25,047 | £22,385 | - | - |
| 2024-04-30 | £26,612 | £21,817 | - | - |
| 2023-04-30 | £21,520 | £20,420 | - | - |
| 2022-04-30 | £14,660 | £11,724 | - | - |
| 2021-04-30 | £8,004 | £5,696 | - | - |

Trustees

| Name | Role | Appointed |
|-------------------------|-------|------------|
| David Tyas | Chair | 2018-12-18 |
| Alan Patrick McDonald | | 2025-07-15 |
| Barbara Winifred Wigley | | 2023-05-16 |
| Brenda Margaret Botten | | 2018-07-19 |
| Elisabeth Furlong | | 2023-10-19 |
| Fiona Ryland | | 2018-09-18 |
| Jerome Way | | 2024-10-17 |
| Karen Marsh | | 2026-05-21 |
| MICHAEL JOHN BENTON | | 2024-10-17 |
| Michael Wilson Astrop | | 2020-10-15 |
| Peter Gibson | | 2023-05-16 |
| William Black | | 2023-11-14 |

UNIVERSITY OF THE THIRD AGE, TODMORDEN

England & Wales - Charity number 1145937

Accounts



Registered Charity No. 1145937

ANNUAL REPORT AND ACCOUNTS 2024-25

University of the Third Age Todmorden was established in April 2008 and became a registered charity in February 2012. Its governing document is the Constitution adopted on 19 July 2018 as amended on 21 October 2021.

The purpose of the charity is 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 the Upper Calder Valley and surrounding areas.

Trustees

The trustees are appointed by the membership at the AGM. Officers are appointed for a period of 2 years and other committee members for 3 years. The constitution provides that the committee may appoint 2 co-opted members for the period of the current year.

The trustees during the year to 30 April 2025 were:

| | |
|-------------------|---|
| David Tyas | Chair |
| Michael Astrop | Vice Chair |
| Fiona Ryland | Secretary to December 2024, Assistant Secretary from January 2025 |
| Mike Benton | From October 2024, Secretary from January 2025 |
| Emily Watnick | Treasurer |
| Gail Allaby | To October 2024 |
| Brenda Botten | |
| Peter Gibson | |
| Barbara Wigley | |
| Elisabeth Furlong | |
| William Black | |
| Jerome Way | From September 2024 |
| Paul Johnson | From May 2024 – July 2024 |

Membership

Membership continues to hold steady at just over 500 members, who represent a wide range of ages and backgrounds. We try to be sensitive to their differing requirements e.g. we now offer 5 different payment methods, including face to face.

Accessibility is important to us; we continue to offer various Group activities and Talks via Zoom, especially during the winter months, for those with mobility/health issues.

In contrast, our newest Groups offer more physical activity - Walking Cricket goes from strength to strength with keen participation in the U3A League, and Pickle Ball is proving increasingly popular.

The Committee works to expand our range of Groups and to spot and encourage potential leaders, especially within the more recent cohort of new Members.

Membership is open to all people who are retired or no longer in full time work in the Upper Calder Valley.

Activities – Report from the Chair

Our membership continues to remain healthy, with over 500 fully paid up members.

For the second year we have held our monthly meetings and several of our group activities in the Todmorden Learning Centre and Community Hub (TLCCH). This has proved to be a most satisfactory venue with up to date audio visual equipment and with spaces to accommodate groups of all sizes. Facilities at TLCCH continue to be improved to our advantage, including a project to improve the entrance hall. With the Fielden Hall in Todmorden being out of action during renovation in the latter part of the year, these facilities proved invaluable. Amongst many other venues used by groups around the area we continue to make use of facilities at the Central Methodist Church.

Our monthly meetings continue to be well attended, usually with over 100 members present. Our speakers have entertained and informed us with topics ranging from “The History of the Halifax Zoo” and “The Assassination of President Kennedy” to the “End of Everything”, and the career of one speaker which took him “From Barrow to Baghdad”.

Once again our speaker-finders must be congratulated on recruiting some entertaining speakers with fascinating and educating tales to tell.

Group convenors continue to work hard to provide entertaining and educational activities for our members, and they must be congratulated for their continued efforts. We now have 42 groups meeting regularly. New groups proving popular include Pickle Ball and Alfresco History and Archaeology.

In the year in question, a long-standing member, Gail Allaby, sadly died. Gail was a vociferous supporter of Todmorden u3a who undertook many important roles in our organisation. She will be missed by us all.

During the year several key members of Todmorden u3a gave notice that they would stand down from their current roles. Fiona Ryland has stepped down as Secretary after providing outstanding service but remains on the committee, and we welcome Mike Benton as our new Secretary. Emily Watnick, who has been instrumental in bringing the role of treasurer up to date with the full use of internet banking, retires in October 2025. We thank her for 9 years service in this crucial role. I am pleased to report that we have a willing and able replacement in Alan McDonald. Ernie Rogan, Linda Cook and Irene Wilkinson also decided to stand down from the organisation of “Lets Go” trips, a task they have undertaken brilliantly for many years - many thanks to them. After a hiatus of some months, new convenors have agreed to undertake this important task, and their first trip took place in June 2025.

Finance

The financial position remains healthy with general reserves standing at £22,538, an increase of £3176 in the year, and total charitable funds at £25,635. The surplus reflects the steady increase in membership numbers and the effect of the subscription rate increase to £20 from May 2024. Expenditure on the General Fund increased by just over £1100 compared to 2023/24, primarily due to increased payments to our parent body the Third Age Trust, and higher venue charges. Lower income and expenditure on the Social Fund is due to the Let's Go programme being inactive in the latter part of the year.

The reserves position allows us to support new special interest groups, invest in new equipment, and cope with further cost increases in 2025/6 ranging from postal charges to venue hire. We will also be able to fund new initiatives such as the short course programme planned for the autumn of 2025. Given the current position the committee is not planning another increase for several years at least.

Designated funds hold monies paid by members in respect of of Let's Go trips, and monies held for hall hire/other expenses by special interest groups.

Bankers

Virgin Money
25 Manchester Rd,
Burnley
BB11 1HX

Principal Address

Fielden Hall
Ewood Lane
Todmorden
OL14 7DD

Reserves Policy

The reserves policy is to maintain a level of general unrestricted funds sufficient to cover around 6 months of an ordinary year's running costs to ensure that activities can be maintained whilst seeking alternative funding, and to allow for the funding of new initiatives. Reserves are more than adequate for this purpose, and it is therefore intended to retain the £20 membership fee for several years at least, while expanding activities and dealing with increasing costs. The policy is reviewed annually by the Trustees.

Accounts

The accounts have been prepared in accordance with the relevant requirements of the Charity Commission and have been reviewed and agreed by the Committee. An independent examination of the accounts was undertaken by Paul Fisher, ex-Treasurer of Clitheroe U3A. His report is set out below.

Independent Examiner's Report

Report to the trustees of The University of the Third Age Todmorden, charity no. 1145937, on accounts for the year ended 30 April 2025, set out on pages 4-5.

I report to the trustees on my examination of the accounts of the above charity for the year ended 30 April 2025.

As the charity 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 Charity'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.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which give 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.

Paul Fisher
Clitheroe u3a
5 August 2025

**University of the Third Age Todmorden
 Receipts and Payments Account
 1 May 2024 - 30 April 2025**

| | General and Group Funds £ | Social Account £ | Total Charitable Funds £ | 2023/24 £ |
|-------------------------------------|------------------------------|---------------------|-----------------------------|-----------------|
| Receipts: | | | | |
| Membership Fees and Donations | 9550.00 | | 9550.00 | 9336.71 |
| Gift Aid Received | 1076.25 | | 1076.25 | 703.75 |
| Special Interest Groups | 10809.73 | | 10809.73 | 9560.92 |
| Let's Go Bookings | | 2760.00 | 2760.00 | 5846.00 |
| Refreshments | 414.28 | | 414.28 | 332.13 |
| Interest earned | 364.06 | 37.88 | 401.94 | 832.35 |
| Miscellaneous | 35.00 | | 35.00 | 0.00 |
| TOTAL RECEIPTS | 22249.32 | 2797.88 | 25047.20 | 26611.86 |
| Payments: | | | | |
| Committee Meetings | 453.75 | | 453.75 | 385.90 |
| General Meetings expenses | 1138.99 | | 1138.99 | 1268.28 |
| Speakers fees and expenses | 703.00 | | 703.00 | 784.80 |
| Third Age Trust - Membership Fee | 2056.00 | | 2056.00 | 1960.00 |
| Third Age Trust - Direct Mailing | 1562.40 | | 1562.40 | 1317.11 |
| Special Interest Groups expenses | 10371.91 | | 10371.91 | 9206.17 |
| Let's Go Coach Hire | | 2645.00 | 2645.00 | 2945.00 |
| Let's Go Entrance Fees/Refreshments | | 1051.00 | 1051.00 | 1151.90 |
| Stationery/Printing/Postage | 740.90 | | 740.90 | 927.29 |
| Equipment purchases/maintenance | 404.31 | | 404.31 | 538.85 |
| IT expenses | 519.00 | | 519.00 | 727.37 |
| Other Meetings and Events | 123.00 | | 123.00 | 417.20 |
| Group start-up grants | 229.89 | | 229.89 | 33.00 |
| Bank and payment card charges | 57.07 | 26.85 | 83.92 | 69.36 |
| Miscellaneous | 280.41 | 22.00 | 302.41 | 85.00 |
| TOTAL PAYMENTS | 18640.63 | 3744.85 | 22385.48 | 21817.23 |

| | | | | |
|--|-----------------|----------------|-----------------|-----------------|
| TOTAL RECEIPTS LESS PAYMENTS | 3608.69 | -946.97 | 2661.72 | 4794.63 |
| Bank Balance Brought Forward | 20807.56 | 2923.90 | 23731.46 | 18833.25 |
| Cash and cheques in hand Brought Forward | 242.50 | 0.00 | 242.50 | 346.08 |
| Total Brought Forward | 21050.06 | 2923.90 | 23973.96 | 19179.33 |
| Receipts | 22249.32 | 2797.88 | 25047.20 | 26611.86 |
| Payments | 18640.63 | 3744.85 | 22385.48 | 21817.23 |
| Total Carried Forward | 24658.75 | 1976.93 | 26635.68 | 23973.96 |

| | | | |
|---|-----------------|----------------|-----------------|
| Bank Balances at 30 April 2025 | 24547.13 | 1976.93 | 26524.06 |
| Cash and cheques in hand at 30 April 2025 | 111.62 | | 111.62 |
| TOTAL AT 30 April 2025 | 24658.75 | 1976.93 | 26635.68 |

| | |
|---|-----------------|
| Analysis of Funds: | |
| General funds | 22538.00 |
| Let's Go designated fund | 1976.93 |
| Special Interest Groups designated fund | 2120.75 |
| TOTAL FUNDS | 26635.68 |

Assets: Equipment

| |
|---------|
| 2048.72 |
|---------|

The accounts were approved at a meeting of the Trustees held on 15 July 2025

Signed:   on behalf of the Trustees

Name: **David Tyas** **Michael Benton**

UNIVERSITY OF THE THIRD AGE, TODMORDEN

England & Wales - Charity number 1145937

Accounts



Registered Charity No. 1145937

ANNUAL REPORT AND ACCOUNTS 2023-24

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Trustees

The trustees are appointed by the membership at the AGM. Officers are appointed for a period of 2 years and other committee members for 3 years. The constitution provides that the committee may appoint 2 co-opted members for the period of the current year.

The trustees during the year to 30 April 2024 were:

| | |
|-------------------|------------------------------------|
| David Tyas | Chair |
| Michael Astrop | Vice Chair |
| Fiona Ryland | Secretary |
| Emily Watnick | Treasurer |
| Gail Allaby | |
| Nigel Plant | to October 2023 |
| Brenda Botten | |
| Gillian Radford | to October 2023 |
| Colin Sanson | to October 2023 |
| Stephanie Haworth | to June 2023 |
| Peter Carrigan | to June 2023 |
| Peter Gibson | from October 2023 |
| Barbara Wigley | from May 2023 |
| Elisabeth Furlong | from October 2023 |
| Tristan Molloy | from October 2023 to February 2024 |
| William Black | from November 2023 |

Membership

Our membership numbers have risen to 521, including 7 Affiliates, at 30 April 2024. The introduction of online joining via PayPal, accessed through our improved website, has simplified the signing up process and led to an increase in new memberships. Meetings with new members have helped the Committee to gain insight into their experience of our organisation, to make changes, and to introduce some new Groups. We continue to encourage participation by Members, for example job-sharing the Convenor's role, where appropriate, and providing refreshments at the Monthly Members Meeting. The move to Todmorden College for monthly meetings has also been positively received – improved access and space is much appreciated.

Membership is open to all people who are retired from full time work in the Upper Calder Valley and surrounding areas.

Activities – Report from the Chair

This has been a year when our membership has increased. Not only have we regained members who left during Covid, we now have many more members than previously.

We now hold our monthly members' meetings at Todmorden Learning Centre and Community Hub (TLCCH) where the facilities in general and particularly those for disabled members, are much more satisfactory. We still use ground floor rooms at our previous venue, the Central Methodists Church, for committee meetings and some other group meetings.

Monthly meetings have been well attended, often with over 100 members present. They have been entertained by some excellent speakers on a wide range of topics - everything from Victorian Antiques to Colour Science! Thanks go to our Speaker Finder for seeking out excellent speakers each month. All members have been kept informed of these events whether present or not. Those members without access to email have been kept informed of monthly members meetings by ordinary mail.

Group Convenors have continued their activities, maintaining group participation. They are to be congratulated for their continued efforts. Some 42 groups are now meeting regularly. Walking Cricket remains a very popular option, with our team winning several games against other u3a groups. New groups this year include Local History, Thursday Cinema and Alfresco History and Archaeology.

During the year in question two previous Chairs of our u3a have sadly died. Jean Pearson and Peter Carrigan both gave a most valuable contribution to our organisation in several different roles.

We have been pleased to welcome new members to the Committee and these are adding great strength and vitality to our activities. However, there is an urgent need for more members come forward to join the committee. We particularly need volunteers to undertake the roles of Business Secretary and Treasurer.

Finance

The financial position remains healthy with general reserves standing at £19,362 and total charitable funds at £23,974. Although costs increased during the year, particularly for hall and room hire charges, financial results were better than anticipated, with a surplus on the General Fund of £3047. This was caused primarily by a much larger than usual number of new members joining – 88 in the year – as well as more members than expected renewing in advance of the 1 May 2024 due date. The subscription rate has increased to £20 for 2024/25, as agreed at the 2022 AGM, and given the current position the committee is not planning another increase for several years at least.

Equipment costs in the year included the purchase of two portable credit/debit card terminals, which allow us to take card payments at our monthly meetings for both subscriptions and Let's Go bookings. Given the difficulties now experienced in handling cash due to the withdrawal of local banking facilities, this has been much appreciated by both members and the Treasurer.

Designated funds hold monies from members in respect of of Let's Go trips, and hall hire/expenses incurred by special interest groups. £2500 was transferred in the year from the Let's Go fund to general reserves.

Bankers

Virgin Money
25 Manchester Rd,
Burnley
BB11 1HX

Principal Address

Fielden Hall
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OL14 7DD

Reserves Policy

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Accounts

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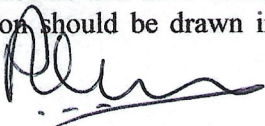
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Paul Fisher
Treasurer, Clitheroe u3a
9 August 2024

University of the Third Age Todmorden
 Receipts and Payments Account
 1 May 2023 - 30 April 2024

| | General Funds | Social Account | Total Charitable Funds | 2022/23 |
|-------------------------------|-----------------|----------------|------------------------|-----------------|
| | £ | £ | £ | £ |
| Receipts: | | | | |
| Membership Fees and Donations | 9336.71 | | 9336.71 | 8234.21 |
| Gift Aid Received | 703.75 | | 703.75 | 692.50 |
| Special Interest Groups | 9560.92 | | 9560.92 | 8132.03 |
| Let's Go Bookings | | 5846.00 | 5846.00 | 3789.00 |
| Refreshments | 332.13 | | 332.13 | 247.71 |
| Interest earned | 649.73 | 182.62 | 832.35 | 380.02 |
| Miscellaneous | | | 0.00 | 44.60 |
| TOTAL RECEIPTS | 20583.24 | 6028.62 | 26611.86 | 21520.07 |

| | £ | £ | £ | £ |
|--|-----------------|----------------|-----------------|-----------------|
| Payments: | | | | |
| Committee Meetings | 385.90 | | 385.90 | 325.00 |
| General Meetings expenses | 1268.28 | | 1268.28 | 987.06 |
| Zoom subscription - committee and general meetings | 0.00 | | 0.00 | 115.12 |
| Speakers expenses | 784.80 | | 784.80 | 725.00 |
| Third Age Trust - Membership Fee | 1960.00 | | 1960.00 | 1724.00 |
| Third Age Trust - Direct Mailing | 1317.11 | | 1317.11 | 1057.13 |
| Special Interest Groups expenses | 9206.17 | | 9206.17 | 8464.01 |
| Let's Go Coach Hire | | 2945.00 | 2945.00 | 1795.00 |
| Let's Go Entrance Fees/Refreshments | | 1151.90 | 1151.90 | 1100.24 |
| Stationery/Printing/Postage | 927.29 | | 927.29 | 1431.71 |
| Equipment purchases/maintenance | 372.05 | 166.80 | 538.85 | 1433.49 |
| IT expenses | 727.37 | | 727.37 | 436.00 |
| Other Meetings and Events | 417.20 | | 417.20 | 623.66 |
| Bank and payment card charges | 52.26 | 17.10 | 69.36 | 12.13 |
| Miscellaneous | 118.00 | | 118.00 | 190.17 |
| TOTAL PAYMENTS | 17536.43 | 4280.80 | 21817.23 | 20419.72 |

