

Chair's Report for AGM 2024- Anne Pinnock

It has been yet another exciting year for Beeston u3a, as numbers continue to grow. We finished the year 2023/24 with just over 1100 members. Although numbers will fall temporarily as the inevitable resignations are processed, May 2024 will be the first time that we have started a new year with over 1000 members. One advantage of this is that we have been able to maintain a relatively low annual subscription, and still have enough in reserve to support interest group activities through grants and loans when needed.

Successful Volunteer Recruitment

The only reason that our u3a continues to go from strength to strength is because of the loyalty and hard work of all the volunteers who make things happen. As we explain at every monthly new members' coffee morning, the only things that happen within Beeston u3a are the things that one of our members has volunteered to help to organise.

Firstly, an enormous thank you to our committee, who work tirelessly for the benefit of the u3a. Two of our longstanding members reach the end of their terms of office this year- Celia Billau (Communications Officer) and Kathy Shipway (Groups Coordinator). They will both be very much missed. Sadly, we had to say goodbye to Ivan Jones, Speaker Seeker last December because of ill-health; thank you to him for his work over the past few years. Fortunately, we have people waiting in the wings to be elected to the committee in May- and want to welcome Susan Krause, Dee May and Roberta Pearson. I am pleased to say that all other committee members are standing for election for another year.

Now that Beeston u3a has such a high membership, it has been essential to explore new ways of making sure that it is sustainable for the future. Our committee is still responsible for setting the direction of the u3a through discussion and policy making, as well as taking on the responsibilities required of all charity trustees. However, committee roles have been reviewed to help manage time commitment. We are well on the way towards enabling more sharing of roles, which will help with succession planning, and decrease the challenge of covering a role when illness strikes, or a much-needed holiday has been planned.

A big change this year has been our work to encourage more volunteers to take on some roles that have traditionally taken by the committee. Because of this we have been able to double our Groups Coordinators' team in size and now have four people supporting the work of interest groups and their facilitating teams. Some administration work is now beginning to be taken on by volunteers, and our new Beeston Events and Awaydays team has just got up and running. Recently, several members have become involved in support for IT in groups and open meetings. We are delighted with the number of people who have come forward to take on additional tasks and are very grateful for this support for both these new tasks, as well as continuing with traditional roles to help with Meeting and Greeting and Refreshments.

Activities

With over 100 interest groups, we hope that everyone is able to find something that they enjoy. Thank you to all the facilitating teams who make these groups possible. Physical activity groups seem particularly popular with recently joined members, and, for example, we are thrilled that Pickleball, which was only set up in January this year has been such a success, in no small part due to the enthusiasm of its facilitator.

Several other new groups have been set up and we thank everyone involved in the organisation of these groups, as well as acknowledging our long-standing facilitators, who continue to run such successful groups year after year. Some groups have needed to find new facilitators to keep their group running, and we are grateful to everyone who has stepped up to do this.

A programme of one-off monthly events is now firmly established: some based around practical lifeskills and some “taster sessions” for leisure activities. The following are examples of what has taken place:- Driving Tips, First Aid, Loneliness, Footcare, Recycling, Online scams avoidance, Croquet and Middle Eastern Drumming. Unexpected bonuses of these one-off activities have been enabling members to mix with people not in their regular interest groups, without a large time commitment as well as hopefully, supporting people to feel part of the whole u3a, rather than always being fragmented out into small groups. I myself have very much appreciated attending these as a way of meeting a larger cross-section of members.

Many of these activities are only possible because of our supportive local venues. Karen, office manager at Beeston Methodist Church always goes out of her way to help us in any way she can. Her flexibility and understanding are much appreciated, and even though costs have needed to rise for room hire this year, they are still reasonable and manageable compared with other commercially run local venues. The upcoming refurbishment programme planned at the church will no doubt create challenges for us, but we know that we will find ways of working around this, with Karen’s support.

Numbers attending monthly open meetings have increased greatly in recent months, following a post-Covid decline. There is always a very lively atmosphere in the Methodist Church Hall at these meetings, and the option to listen in via Zoom is now regularly offered for those members who are unable to attend in person, now that volunteers have come forward with skills in hosting hybrid meetings. Our plan of offering a broad range of speakers at these continues, thanks to the enthusiasm and hard work of Karen Attwood, who volunteered to take over this role on committee at very short notice.

Events

Large events such as Fine Wine, “Not the fine wine”, a Ceilidh and Quiz have taken place, involving a lot of hard work by the committee. It hasn’t been easy to attract the numbers needed to make outings by coach economically viable. So, a new programme of local outings is just starting- the first being a tour of Nottingham Council House and a visit to Stonebridge City Farm a month later. This programme will mainly be accessible via public transport where possible and involve only minimal costs to attendees. Thank you to recent member Sue Gregg, who has powered forward with these, supported by a small team, which we hope to grow further over the coming year.

A disadvantage of the rapid growth in numbers is that some of our traditional events have become unmanageable. We held a very successful Groups Fair last autumn, but the organisational challenges of doing this for over 100 groups at the same time, mean that we need to find new ways of showcasing the work of our groups for the future.

January’s Group Facilitators’ lunch was also very much appreciated by attendees and we are determined that this will continue. However, we are very aware that we also need to find ways of ensuring that our growing band of additional volunteers are appreciated, and are working on new ways to do this.

After the AGM, a special edition of our newsletter will be published, highlighting the work of our volunteers and celebrating their achievements.

Finally...

In conclusion, Beeston u3a has had a very good, though busy year. There are always going to be challenges and we need to keep finding ways to overcome these. However, as long as members continue to support by volunteering to take on roles, as well as come forward with suggestions for continuing to improve, I have every confidence that Beeston u3a will continue to grow and further develop its place as a vibrant hub of the community.

APPENDIX A1



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name

Beeston u3a

Receipts and

For the period from

Period sta

1-Apr-

Section A Receipts and payments

Unrestricted
funds

Restricted
funds

to the nearest £

to the nearest £

A1 Receipts

Group Accounts	-	26,687
Social Account	-	16,122
Subscriptions	16,638	-
Visitors	52	-
HMRC Gift Aid	2,355	-
Miscellaneous	131	-
Interest	427	-
	-	-
	19,603	42,809
Sub total (Gross income for AR)		

A2 Asset and investment sales, (see table).

	-	-
	-	-
Sub total	-	-

Total receipts

19,603

42,809

A3 Payments

Group Accounts	-	25,995
Social Account	-	15,406
Administration	1,691	-
Affiliation Fees	3,802	-
Third Age Matters Publication	2,639	-
Operating Costs	6,632	-
Equipment	25	-
Expenses	-	-
Miscellaneous	192	-
	-	-
	-	-
Sub total	14,981	41,401

A4 Asset and investment purchases, (see table)

	-	-
	-	-
Sub total	-	-

Total payments **14,981** **41,401**

Net of receipts/(payments) **4,622** **1,408**

A5 Transfers between funds **-** **-**

A6 Cash funds last year end **34,047** **6,773**

Cash funds this year end **38,669** **8,181**

APPENDIX A2**Section B Statement of assets and liabilities at the end of**

Categories

Details

B1 Cash funds

HSBC Current Account
HSBC Savings Account
HSBC Social Account
PayPal Account
Group Accounts

Total cash funds

(agree balances with receipts and payments account(s))

B2 Other monetary assets

Details

B3 Investment assets

Details

B4 Assets retained for the charity's own use

Details

B5 Liabilities

Details

Signed by one or two trustees on behalf of all
the trustees

Signature

	No (if any) 1152882
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payments accounts

rt date 23	To	Period end date 31-Mar-24
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CC16a



Endowment
funds

Total funds

Last year

to the nearest £

to the nearest £

to the
nearest £

-
-
-
-
-
-
-
-
-
-
-

26,687
16,122
16,638
52
2,355
131
427
-
62,412

21,532
12,284
15,234
25
2,099
277
34
-
51,485

-
-
-

-
-
-

-
-
-

-

62,412

51,485

-	25,995	20,936
-	15,406	12,284
-	1,691	1,533
-	3,802	3,624
-	2,639	2,346
-	6,632	4,376
-	25	50
-	-	-
-	192	275
-	-	-
-	-	-
-	56,382	45,424

-	-	-
-	-	-
-	-	-
-	56,382	45,424
-	6,030	6,061
-	-	-
-	40,820	34,759
-	46,850	40,820

the period

Unrestricted funds

Restricted funds

Endowment funds

to nearest £

to nearest £

to nearest £

29,977
8,481
211
-
38,669

OK

**Unrestricted
funds**

to nearest £

-
-
-
-
-
-

**Fund to which asset
belongs**

**Fund to which asset
belongs**

**Fund to which
liability relates**

4,699
3,482
-
8,181

OK

**Restricted
funds**

to nearest £

-
-
-
-
-
-

Cost (optional)

-
-
-
-
-
-

Cost (optional)

-
-
-
-
-
-
-
-
-

**Amount due
(optional)**

-
-
-
-
-

-
-
-
-
-
-
-

OK

**Endowme
nt funds**

to nearest £

-
-
-
-
-
-

**Current
value
(optional)**

-
-
-
-
-
-

**Current
value
(optional)**

-
-
-
-
-
-
-
-
-

**When due
(optional)**

Print Name

Date of
approval



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

**Independent examiner's
report on the accounts**

Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Beeston U3A

**On accounts for the year
ended**

31 March 2024

**Charity no
(if any)**

1152882

Set out on pages

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2024.

**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").

**Independent
examiner's statement**

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.

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:

B. J. Steel

Date:

12 April 2024

Name:

Bernard Whelan

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

N/A

Address:

194 Meadow Road

Beeston, Nottingham

NG9 1JR

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

None