

Islington u3a Trustees Annual Report 2023/2024

This report is presented by the Trustees, the members of the Executive Committee (EC) of Islington u3a (iu3a). It includes a summary of the accounts in respect of the financial year ended 30 September 2024.

Summary

Islington u3a is a voluntary organisation that is run totally by and for its members. We have no paid staff. 'It All Depends on Us' continues to be our strapline. The EC is grateful to all members who contribute so much of their time, energies and expertise in organising and maintaining iu3a's activities. Without you iu3a would not be the vibrant, active and successful organisation that it is today. We hope that you have enjoyed your year with iu3a and will continue with us, enjoying all the activities we provide.

Status

Islington u3a is an unincorporated association, registered as a charity by the Charity Commission for England and Wales with registration number 1157067. Its correspondence address is 8 College Cross, London N1 1PP and its website address is www.islingtonu3a.org.

Executive Committee

Islington u3a is managed by its EC. Members of the EC are all appointed by the members of iu3a at the Annual General Meeting (AGM) after a nomination process in accordance with iu3a's Constitution. Candidates for appointment (who must be members of iu3a) must be nominated by two iu3a members who are not also members of the EC. iu3a members are invited to submit nominations and, if there are more nominations than places available, a ballot is held. No such ballot was required in respect of the appointments made at the AGM in November 2023.

In addition the EC may itself appoint no more than two co-opted members (who must be members of iu3a) to hold office until the next AGM.

The following served as members of the EC since the last AGM:

Officers:

- **Chair:** Paula Kahn
- **Secretary:** Alison Finlay
- **Treasurer:** Mary White

Other committee members:

- Joy Bailey
- Chris Bulford
- Derek Harwood
- Georgia Lepper



- Margaret Orrell
- Barbara Nokes
- Helen Perkins (resigned 18 May 2024)
- Katy Harper

In addition, sub-committees or teams were established to help with a number of activities. This strategy allows sharing of the workload and involves more of the membership. The Monthly Meeting sub-committee, the Communication Committee, and various Events Teams have been particularly effective. Also our 80+ Interest Groups have been supported by a Groups Team.

Paula Kahn (current Chair) and Mary White (current Treasurer) retire at this AGM.

Antonia Benedek is nominated to stand as Chair and Robert Tench as Treasurer from November 2024.

Bob Noah is nominated to join our Executive Committee.

Retiring Committee Members

Paula Kahn has served us well in her three years as Chair. She took up the role just post-Covid and worked with the executive team and members to draw the membership back into the new world of meeting in person. Both experienced and new members have widened the range of activities, including overseeing a very successful Summer Party.

Mary White has given us years of dedicated service in the role of Treasurer amongst her other activities in iu3a. Her contribution has been vital to the growing success and sustainability of our u3a over the last five years.

Margaret Orrell will also stand down from the EC having served in a key role as organiser of our highly successful monthly meetings, and worked with others on a range of events such as the Summer Party.

We want to thank all of them for their exemplary contribution to the success of iu3a.

We are always in need of volunteers to help run an organisation of this size (780+ members and continually growing) and would encourage members to consider helping in any way they can. The tasks are very varied, and range from organisational responsibilities to small but regular tasks to help on one-off occasions. In short, any form of help you can offer would be appreciated. Islington u3a is run entirely by its members – it all depends on us.

Public Benefit

The public benefit role of iu3a as stated in our Constitution is the advancement of education and self-learning, and in giving effect to this

role the EC has had regard to the Charity Commission's guidance on public benefit.

Objects

There has been no change to our Constitution in the year. The Objects are: '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'.

Islington u3a fulfils these objects and provides public benefit by enabling members to share their knowledge and experience and thereby continue to learn, in particular through study and discussion groups (Groups) and other meetings of members. It also provides opportunities for personal development and social contact at a stage of life when personal horizons and social networks may often shrink, leading to social isolation and a deterioration in health and well-being.

The Groups are at the core of iu3a and reflect the knowledge, skills and expertise of its members. Many Groups are based on equal participation, while others (for example language Groups) are led by members who are experts in the subject.

Activities, Achievements and Objectives

Membership of iu3a continues to rise week on week. We have also introduced Gift Membership, through which we have gained several new members.

This year has been a delight and the Summer Party in Olden Gardens deserves particular mention. The enthusiasm and community feeling at this event revealed how far we have come from Covid and how we are all now focused on the future. Margaret Orrell, Mary White and their team did an amazing job.

We have had to move our Monthly meetings to a larger hall as the number of members attending is rising month by month. We now record each talk (subject to the speaker's permission) and the videos are available to members on our website. Margaret Orrell has led our Monthly Meeting Subcommittee and Chris Bulford and Sally Fox organise our excellent team of Meeters and Greeters. We are grateful to all our speakers for giving freely of their time, knowledge and expertise.

We have introduced a policy of allowing members to bring a guest to one Monthly meeting as a taster of our activities.

Georgia Lepper, our Groups Support officer, does a magnificent and demanding job overseeing the Groups – 82 at the time of writing – which cover a range of interests including outdoor activities (walks of varying lengths and outings to places of interest); games, indoor and outdoor; the arts (both seeing and making); and a great selection of discussions of contemporary issues, books and ideas.

Once up and running, groups offer opportunities for meeting others who share interests, enabling all to develop their skills or just enjoy doing things together.

Examples of recent additions on offer are: Sketching in the City, a group which meets at different locations in and around Islington to draw the urban scene, led by Judith Pederson who is a practising artist; Qi Gong, a physical discipline promoting health and well-being, suitable for those with mobility problems as well as the fully fit, led by Jan Durbridge, a qualified practitioner; and more recently, a new discussion group, The Coming Wave, exploring the impact of Artificial Intelligence on our lives, led by Georgia Lepper and Vivek Nanda (IT expert).

The Groups using online material as the Subject Adviser have gone from strength to strength, with Bitesize groups being formed throughout the year. Each Group still meets in person for the first and last sessions, and the discussion sessions are held on Zoom.

The popular Pub Lunch meetings rove right across the borough, and continue to attract a wide range of members – thank you, Andy Watson.

Judith Altshul, our Outings Coordinator, continues to organise a programme of visits to wonderful places throughout the year. This year our Outings have consisted of visits to a variety of places, including – as a sample – Ely, Keats House, Hampstead, Eltham Palace.

In March the Outing was to Eltham Palace, the childhood home of Henry VIII. 13 members travelled to south London to stroll in the palace gardens. A volunteer guide then gave us a short history of the building before escorting us to the Great Hall.

Then, in April, the Outing was to Keats House in Hampstead. 20 members had a guided tour around the house, which dates from 1815. John Keats lived there in 1818-19 for 17 months, having come to the house after nursing his younger brother who died of TB.

In June, in perfect weather, 14 iu3a members enjoyed the tour of Ely Cathedral provided by a voluntary guide. He focused on the history of the Cathedral's foundation, on the site of an abbey founded by St Ethelreda in 672, its relationship with the Fens, and on its magnificent architecture including the famous Octagon tower.

New Website and Social Media

Work on developing our new website is progressing. Katy Harper is now leading the project. A survey went out to all members in September to identify how our current site is visited and used, and to help us highlight our 'Unique Selling Points' to attract new members. We would like to thank everyone who completed the survey. Planning and compiling the content is a huge task, but is now well under way and we hope to have a new site live next year.



Our Communications Team have also been active this year. Our fortnightly bulletin, WOW ('What's on When') has gone from strength to strength.

The Communications Team have also increased our publicity efforts. We have a strong social media presence which informs current members and attracts new members. With Facebook posts twice a week, we have a strong following. Our Facebook page, created and maintained by Jo-Ann Kennedy, is well established and is linked with our Instagram account. Our most popular Facebook post was viewed by 3,402 users. We have 266 followers and this number builds month by month.

As we attract a younger membership, social media will play a bigger part in our communications.

Treasurer's Report

We have come to the end of this financial year with a balance of £26,763. This year we have had sufficient funds to enable us to keep our membership fee at £25 and we are still sufficiently financially stable to sustain this level for the forthcoming year. More members have joined so that has increased our income.

Last year we anticipated the launch of the new website so budgeted for that. However, it is taking longer than expected, so the budget has been carried over. Our greatest expenditure has been on monthly meeting hire costs and catering, but we are grateful to the wonderful speakers who have given their services for free. We have spent slightly more on room hire costs this year due to small increases but also because there has been more group activity, which is a positive. This year we held another successful Summer Party which was subsidized by £3.50 per person. We had a record number of members attending and we hope this will continue.

To conclude, my tenure as Treasurer is now over and I wish our new treasurer the very best.

Chair

Signature:

Handwritten signature of Paula Kahn in black ink.

Name: Paula Kahn

Date: 29 October 24

Treasurer

Signature:

Handwritten signature of Mary White in black ink.

Name: Mary White

Date: 29 October 24

Islington u3a Final 2023/24 Accounts					
September 30 2024					
July 2025 Update for COIP	Full Year				
RECEIPTS					
Subs	19,103				
Tam	96				
Donations and grants	-				
Events (theatre only)	3,996				
Events (all others)	2,406				
Interest	1,635				
Sundries	154				
Total	27,390				
EXPENDITURE					
Subscription fees	2,980				
TAM	617				
Beacon fee	746				
Pay Pal fees	343				
Events (theatre only)	3,105				
Events (others)	2,924				
Outings	134				
INTEREST GROUPS					
Co-ordinators	1,529				
Room Hire for groups	2,015				
Group expenses sundries	66				
Group equipment purchases	300				
Monthly meeting-rooms	4,300				
Monthly meeting-equip	1,432				
Monthly meeting-catering	4,643				
Monthly meeting sundries	296				
VAT	2,066				
IU3A Development					
Publicity external	100				
Membership dev.	358				
Website dev,	1,131				
OTHERS					
Others/Stationery	73				
Admin and sundries	292				
Subscriptions/licenses	852				
Postage					
Contingency					
Refunds	70				
Total	30,372				
Net incoming resources	(2,982)				
Add surplus from prior year	30,355				
Closing Balance at 30.09.24	27,373				
Reconciliation to bank accounts					
Add back Deferred Receipts	14,663				
Deduct Prepayments 23/24	(279)				
Total	41,757				
	Barclays 1	Barclays 2	COIF	Paypal	Total
Opening Balance at 30.09.23	6,542	160	24,839	10,218	41,759
Add incoming receipts for year	3,571	6,585	1,635	15,598	27,390
Deduct expenditure for year	(26,166)	(3,447)	-	(760)	(30,372)
Transfers - PayPal	15,100	-	-	(15,100)	-
Transfers - Barclays	2,273	(2,273)	-		-
Deferred Receipts 22/23 reversed	(1,492)	(125)	-	(10,001)	(11,618)
Deferred Receipts 23/24	1,565	125	-	12,973	14,663
Prepaid 22/23 reversed	-	-	-	214	214
Prepaid 23/24	-	-	-	(279)	(279)
Closing Balance at 30.09.24	1,393	1,026	26,474	12,864	41,757



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees

Charity Name

ISLINGTON U3A

On accounts for the year ended

Charity no
(if any)

1157067

Set out on pages

(remember to include the page numbers of additional sheets)

Responsibilities and basis of report

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

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 the words in the brackets if they do not apply.

Signed:

Date:

8/12/2024

Name:

MICHAEL VICTOR FLEMING

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

Address:	
	27 BLYTH MEWS HALESWORTH
	HALESWORTH SUFFOLK IP19 8FB
Section B	Disclosure
	Only complete if the examiner needs to highlight material 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.	