

NORTH WEST REGION OF U3AS

England & Wales · Charity number 1159091

Details

Status Registered

Legal form Other

Registered 2014-11-06

Register [View on the Charity Commission register](#)

Contact

Address 8 Salwick Close
Wigan
Lancashire
WN3 6RE

Phone 01744895515

Website www.u3asites.org.uk/north-west

Activities

Objects: 3.1. The Network'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 Network Area. This will be mainly undertaken by providing support and assistance to the University of the Third Age organisations [u3as] in the Network Area.

Activities: The Charity provides support to constituent U3As within the North West of England through the educational programme of the Third Age Trust - Charity No: 288007, and by delivering and developing educational activities and events that enhance the efficiency and effectiveness of U3A constituent charities.

Classification

- **How:** Provides Human Resources, Provides Buildings/facilities/open Space, Provides Services
- **What:** Education/training
- **Who:** Elderly/old People, People With Disabilities

Geography

- Throughout England

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£27,295	£29,229	-	-
2024-03-31	£31,185	£29,120	-	-
2023-03-31	£20,953	£22,736	-	-
2022-03-31	£1,377	£158	-	-
2021-03-31	£444	£502	-	-

Trustees

Name	Role	Appointed
Alan Hough		2017-06-07
Christine Garrity		2025-07-01
David John Findon		2025-07-01
Elizabeth Booth		2025-07-01
Gillian Russell		2021-04-02
John Bower		2025-07-01
Marjorie Taylor		2025-07-01
Mark Graham Bradley		2025-07-01
Neill Stewart		2025-07-01
Paul King		2025-07-01

NORTH WEST REGION OF U3AS

England & Wales - Charity number 1159091

Accounts

North West Region Trustee Report 2024 – 25

6th November 2014 the North West Region of u3as was registered as a Charity and is administered by Trustees who are also members of the Executive Committee. The North Region of u3as is subject to the Charities Act and associated regulations and the Trustees are accountable to the Charity Commission as well as Member u3as for the administration of this charity.

The Trustees (Executive Committee) until AGM July 2025

Chair: Gillian Russell

Secretary: Hilary Scarratt

Treasurer: Alan Hough

General Committee members:

Christine Garrity

David Findon

Neil Stevenson

Mark Bradley

Deborah Reardon (co-opted)

Paul King (co-opted)

North West of England Trustee, Third Age Trust - David Blanchflower was an ex officio member of the committee. The role of regional Trustee ended in March 2025 and was replaced by a National Council with two representatives from the North West Region: David Blanchflower; Gillian Russell

Between the end of March 2024 and the beginning of April 2025, the committee has held 5 planning meetings and attendance has averaged 80%.

The charitable purposes are set out and governed by the Constitution, as adopted at the AGM on 10th June 2014, amended at the AGM on 4th June 2015 and then on 14th September 2021. There are 97 u3as and around 40,000 members in the NW Region, representing approximately 10% of u3as and members in the UK.

ACTIVITIES 2024-25

The main role of the regional committee is to support the regional trustee and, under their guidance, to provide a service to the members, the u3as and the Networks. We do this in three main ways:

- Firstly, we help with the formation of new u3as and networks. There have been no new groups this year but two closures. We have 97 u3as and more than 40,000 members. We also help to support existing u3as. Members of the committee help with communication to keep members informed about planned national and regional activities.
- The second thing we do is organise and run a variety of events for members. This usually includes workshops, seminars and conferences on topics of value to u3as in the region. Several events have been held, some using Zoom as a medium, others being held face to face. These included:
 -
 - o 10th May 2024: Big Sing; a popular event which enables members to come together to enjoy singing in a variety of styles. Members came together to enjoy singing as well as to learn some simple harmonies. Attendees expressed enjoyment of the event.

- 2nd July 2024: The 14th Annual General meeting and Conference of the North West Region It was attended by representatives from 25 u3as and the feedback was very positive. The Conference included the following workshops in the morning: Flash Fiction; Writing Haiku; Public Relations; EDI. We enjoyed a performance by a singer, Barry Humphries before the AGM took place.
- The NW Summer School was held in Carlisle from August 15th - 18th. It was attended by 80 members from around the UK. The feedback was very positive and we plan to repeat the event in 2025, perhaps in a different venue.
- 15th October 2024: Face to face national workshop – Interest Groups Matter. Attended by 48 members.
- 24th January 2025: Zoom 'Meet the Committee' an invitation to help with Succession planning.
- 17th March 2025: Zoom– National workshop 'Recruitment and Valuing Volunteers' which was aimed primarily at NW members.
- 18th March 2025: Zoom peer to peer meetings for Membership Secretaries and Speaker Secretaries.

RESOURCES

Our regional website is a useful tool to help to keep our members informed. It has been upgraded to Siteworks and has a new website manager, Mark Bradley. Pages include news and events from around the region and a new page has been added for the Council members representing the region on a National Council which comes into effect in April 2025

FINANCE 2024-25

The North West region held £19095 in the bank at 31st March 2025, £3610 higher than the balance of £15485 as at 31st March 2024. This increase in funds was due primarily to advance deposit receipts from enrollees for the 2025 Summer School.

The deficit in the year on the receipt and expenditure account of £1934 compared to a surplus in 2023/2024 of £2065. The deficit arose primarily from the cost of the AGM and committee meeting expenses, and a marginal loss on the 2024 Summer School due to lower attendees than the previous year. Looking to 2025/2026 overall reserves are still healthy at £10905 at the start of the year. £5000 is held in general reserve and £5905 in accumulated revenue reserves.

The 2025 Summer School is planned to be run in August 2025 at the Metropolitan University of Manchester. Enrolment has been taking place since January. This is currently running significantly higher than last year, and should lead to a surplus.

FUTURE ACTIVITIES

Events being considered for 2025– 2026 include:

- Conference and AGM July 2026
- August 2025 Residential Summer School at Manchester Metropolitan University (MMU)
- September 2025 – collaborative event with Manchester Geological Association
- Workshops – to be decided.
- Networking event
- Look for an area to open a new u3a.

Members of the committee will continue to support the Council members in helping our u3as.

The trustees have approved the Trustees' Report above.
Signed on behalf of the charity's trustees.



Gillian Russell.
Chair, North West Region of U3As
Dated: 8th June 2025

Proposed by Jane Kemp from Bromborough and Seconded by Dave Rydings from Skelmersdale at AGM 1st July 2025. 30 votes for, none against.

NORTH WEST REGION OF U3As

Registered Charity No : 1159091

Financial Statement for the Year

1 April 2024 to 31 March 2025

NORTH WEST REGION OF U3As

INCOME AND EXPENDITURE ACCOUNT

2023/2024 YEAR

1/04/24-31/3/25

Income £	Expenditure £	Total £		Income £	Expenditure £	Total £
1. North West Region Funded Activities						
29495.00	26259.49	3235.51	Summer School (Cumbria university)	25946.75	26055.54	-108.79
670.00	1205.04	-535.04	Annual general meeting	215.00	1153.15	-938.15
	77.89	-77.89	Zoom licence/computer expenses			0.00
	493.95	-493.95	Committee meetings		442.52	-442.52
		0.00	Training expenses			0.00
1020.00	400.60	619.40	Big Sing event	585.00	820.00	-235.00
	470.50	-470.50	Workshop - best ever AGM			0.00
	212.70	-212.70	Workshop - fit for future	168.00		168.00
2. Third Age Trust Funded						
		0.00	Workshop - interest groups matter	380.00	758.00	-378.00
31185.00	29120.17	2064.83		27294.75	29229.21	-1934.46

AS AT 31/3/25

-1934.46

NORTH WEST REGION OF U3As

BALANCE SHEET

3/31/2024		3/31/2025
£		£
	Current Assets	
15485.26	Bank Account	19095.10
<u>15485.26</u>		<u>19095.10</u>
	Represented by:	
	Capital Account	7839.09
	Plus current ytd surplus	-1934.46
7839.09		5904.63
455.00	Summer school prepayments	12450.00
	Summer school deposit / payments	-6332.70
		6117.30
15.00	Big Sing 2024 prepayments	0.00
597.37	Lancashire Link	597.37
366.60	Lancashire and merseyside network	263.60
90.39	Deeside and Wirrall network	90.39
1121.81	Greater Manchester network	1121.81
5000.00	General Reserve	5000.00
<u>15485.26</u>		<u>19095.10</u>



Section A

Independent Examiner's Report

Report to the trustees

Charity Name
NORTH WEST REGION OF U3A's

**On accounts for the year
ended**

31ST MARCH 2025

**Charity no
(if any)**

1159091

Set out on pages

1 and 2

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'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**

I have completed my examination. I confirm that no material matters have come to my attention 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 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.

Signed:

Date:

Name:

ROGER LUCKHURST

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

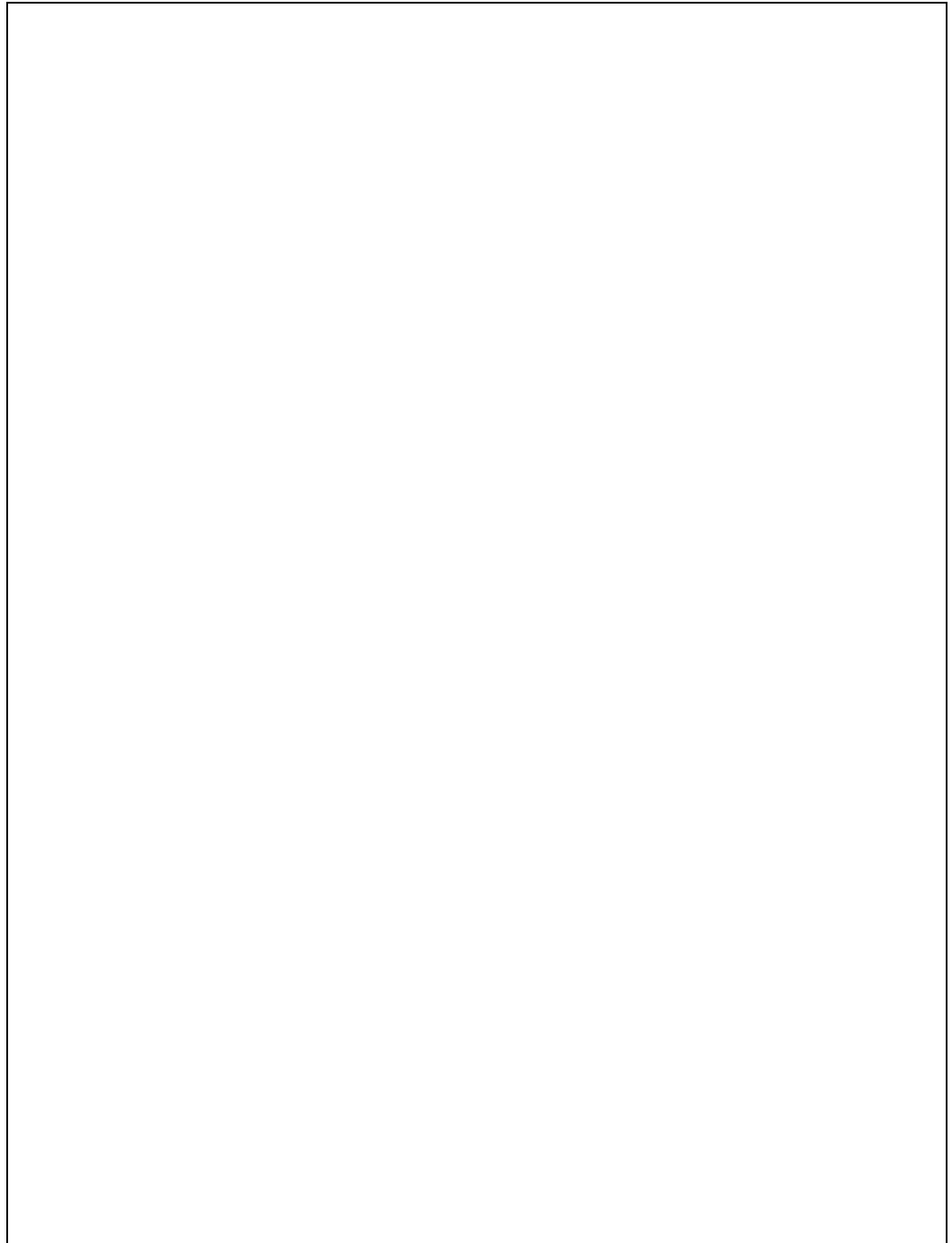
Address:

16 HAZELWOOD ROAD, WIGAN WN1 2PE

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.



NORTH WEST REGION OF U3AS

England & Wales - Charity number 1159091

Accounts



NORTH WEST REGION OF U3As

TRUSTEE'S ANNUAL REPORT

Charity Registration no 1159091

2023-2024

On 6th November 2014 the North West Region of u3as was registered as a Charity and is administered by Trustees who are also members of the Executive Committee. The North West Region of u3as is subject to the Charities Act and associated regulations and the Trustees are accountable to the Charity Commission as well as Member u3as for the administration of this charity.

The Trustees (Executive Committee) **until AGM July 2024**

Chair : Gillian Russell

Vice-Chair : Tony Cheetham – resigned December 2023

Acting Treasurer: Alan Hough

Member: Christine Garrity became acting VC in January 2024

Ex officio Member: as NW Trustee, Neil Stevenson until October 2023 then filling a casual vacancy.

Officio member as NW Trustee: Tony Cheetham from October 2023– resigned December 2023

Co-opted member – David Findon

Co-opted member Deborah Reardon

Co-opted member Kathryn Fyfe

North West of England Trustee, Third Age Trust Neil Stevenson retired October 2023

North West of England Trustee elected October 2023 Tony Cheetham, resigned 2023

- During the period from February 2023, Gillian Russell, elected Vice Chair, became acting chair when the elected chair, Mary Waters stepped down due to health problems. No one was nominated as Treasurer and Alan Hough agreed to monitor the accounts while we tried to recruit a new officer. On the resignation of Tony Cheetham, Christine Garrity became acting Vice Chair until the next AGM.
- The region now has a public relations advisor who attends committee meetings as a guest but is not elected or co-opted to the committee.

The charitable purposes are set out and governed by the Constitution, as adopted at the AGM on 10th June 2014, amended at the AGM on 4th June 2015 and then on 14th September 2021. There are 99 u3as and around 43,000 members in the NW Region, representing approximately 10% of u3as and members in the UK.

ACTIVITIES 2022-23

The main role of the regional committee is to support the regional trustee and, under his guidance, to provide a service to the Members, the u3as and the Networks in our region to advance education. We do this in three main ways:

- Firstly, we help with the formation of new u3as and networks. There have been no new groups this year but two closures – Blackpool u3a and Blackburn u3a so we now have 97 u3as. Our membership remains over 40,000. We also help to support existing u3as. A group of Regional Contact Volunteers is responsible for maintaining contact and support to groups of u3as around the NW Region. They have kept members informed of planned national and regional activities and have also provided a focus point to channel queries.
- The second thing we do is organise and run a variety of events for members. This usually includes workshops, seminars and conferences on topics of value to u3as in the region. Several events have been held, some using Zoom as a medium, other being held face to face. These included:
 - 10th May 2023: Big Sing; a popular event which enables members to come together to enjoy singing in a variety of styles. It was attended by more than 70 members came together to enjoy singing as well as to learn some simple harmonies. Attendees expressed enjoyment of the event.
 - 4th July 2023: The 14th Annual General meeting and Conference of the North West Region It was attended by representatives from 42 u3as and the feedback was very positive. The Conference

NORTH WEST REGION OF U3As

BALANCE SHEET

	31/03/2023 £	31/03/2024 £
Current Assets		
Bank Account	11953.62	15485.26
	<u>11953.62</u>	<u>15485.26</u>
Represented by:		
Capital Account		5774.26
Plus current ytd surplus	5774.26	2064.83
		<u>7839.09</u>
Summer school 2024 prepayments	0.00	455.00
Big Sing 2024 prepayments	30.00	15.00
Lancashire Link	597.37	597.37
Lancashire and merseyside network	461.60	366.60
Deeside and Wirrall network	90.39	90.39
Greater Manchester network		1121.81
General Reserve	5000.00	5000.00
	<u>11953.62</u>	<u>15485.26</u>

NORTH WEST REGION OF U3A's AGM FINANCIAL REPORT 2023/2024

The North West region held £15485 in the bank at 31st March 2024, £3531 higher than the balance of £11954 as at 31st March 2023.

This increase in funds was due primarily to a surplus on the receipt and expenditure account for the year, arising primarily from a profit on the summer school; and a receipt of funds from the Greater Manchester network held in reserve on the balance sheet at the year end.

The surplus in the year on the receipt and expenditure account of £2065 compared to a deficit in 2022/2023 of £1783.

The surplus arose primarily from the success of the 2023 Summer School (£3236 profit) and the Big Sing event (£619 profit).

These profits were only partially offset by the cost of the AGM, committee meeting expenses, and workshops offered without charge.

Looking to 2024/2025 overall reserves are still healthy at £12839 at the start of the year. £5000 is held in general reserve and £7839 in accumulated revenue reserves.

The 2024 Summer School is planned to be run in August 2024 at the University of Cumbria in Carlisle. Enrolment has been taking place since the end of January. This is currently running lower than last year, and coupled with the increased costs of running the event, may lead to a deficit.

Alan Hough.

Treasurer.

30th April 2024



Section A

Independent Examiner's Report

Report to the trustees

Charity Name

NORTH WEST REGION OF U3A's

On accounts for the year
ended

31ST MARCH 2024

Charity no
(if any)

1159091

Set out on pages

1 and 2

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'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

I have completed my examination. I confirm that no material matters have come to my attention 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 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.

Signed:

J. G. Smith

Date:

12.5.24

Name:

James Gerald Smith

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

Retired Banker

Address:

Flat 4, 249 Wigan Road, Standish, Wigan WN1 2RF

included the following workshops in the morning: Interest groups matter; the u3a and the Third Age Trust; Shared Learning. We enjoyed a performance by a concert pianist, Andrew Wilde before the AGM took place. Those attending commented on the value of face to face discussions and the opportunity to network with members from around the North West Region.

- 20th February (zoom) and 5th March (face-to-face) meetings with national chair Liz Thackray about the future structure of the Trust Board.
- 6th October 2023: AGM workshop; a face to face event attended by 30 members representing more than 20 u3as. The purpose was to develop better understanding of the planning and process of managing an AGM
- The NW Summer School was held in Carlisle from August 15th - 18th. It was attended by 80 members from around the UK. The feedback was very positive and we plan to repeat the event in 2024.

It is recognised that the North West u3a website is an important tool to help to keep our members informed. Some of the members of the committee have continued to update and revitalise this site throughout the year. One of these developments has been to add a news page and a page for information from our Public Relations Adviser, Kelvin Rushworth.

-The third area where the committee supports our regional trustee is helping u3as who are having problems and ask for help.

RESOURCES

Between the end of March 2023 and the start of April 2024, the committee has held 5 planning meetings and attendance has averaged 95%.

FINANCE 2023-24

The North West region held £15485 in the bank at 31st March 2024, £3531 higher than the balance of £11954 as at 31st March 2023.

This increase in funds was due primarily to a surplus on the receipt and expenditure account for the year, arising primarily from a profit on the summer school; and a receipt of funds from the Greater Manchester network held in reserve on the balance sheet at the year end.

The surplus in the year on the receipt and expenditure account of £2065 compared to a deficit in 2022/2023 of £1783, the surplus arose primarily from the success of the 2023 Summer School (£3236 profit) and the Big Sing event (£619 profit).

These profits were only partially offset by the cost of the AGM, committee meeting expenses, and workshops offered without charge.

Looking to 2024/2025 overall reserves are still healthy at £12339 at the start of the year. £5000 is held in general reserve and £7839 in accumulated revenue reserves.

The 2024 Summer School is planned to be run in August 2024 at the University of Cumbria in Carlisle. Enrolment has been taking place since the end of January. This is currently running lower than last year, and coupled with the increased costs of running the event, may lead to a deficit.

FUTURE ACTIVITIES

Events planned for 2024– 2025 include:

- Conference and AGM July 2024
- Residential Summer School at the University of Cumbria - August 2024
- Celebrate u3a – September 2024
- Workshops – to be decided.
- Networking event
- Look for an area to open a new u3a.

Members of the committee will continue to support the regional trustee in helping our u3as.

The trustees have approved the Trustees' Report above.

Signed on behalf of the charity's trustees.



Gillian Russell.
Chair, North West Region of U3As
Dated: 6th April 2024