

BURY U3A

England & Wales · Charity number 1165090

Details

Status Registered

Legal form Other

Registered 2016-01-08

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

Contact

Address 21 Turton Close
Bury
Lancashire
BL8 2EE

Phone 07931 348971

Email burytreasurer@gmail.com

Website www.buryu3a.org.uk

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 IN THE AREA OF BENEFIT.

Activities: The Bury U3A (University of the Third Age) is a democratic, self-funding, self help organization that provide all types of educational and leisure activities for retired or semi-retired people at minimum cost. It provides opportunities for members to share learning experiences and to pursue educational, creative and leisure activities by making use of the knowledge and skills of their members.

Classification

- **How:** Provides Services
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives, Arts/culture/heritage/science
- **Who:** Elderly/old People

Geography

- **Area of benefit:** BURY AND THE SURROUNDING LOCALITY.
- Bury

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£29,262	£32,387	-	-
2024-03-31	£26,633	£24,591	-	-
2023-03-31	£29,433	£23,528	-	-
2022-03-31	£24,374	£16,652	-	-
2021-03-31	£3,159	£8,921	-	-

Trustees

Name	Role	Appointed
Alistair Scott		2025-05-13
Catherine Mary Holland		2024-05-21
Helena Taylor		2026-05-12
Ian Worthington		2023-05-16
Lynne Roberts		2026-05-12
Naomi Jane Richardson		2023-05-16
Steve Ratcliff		2025-09-16
Yvonne Brunsdon		2025-05-13

BURY U3A

England & Wales - Charity number 1165090

Accounts

Chair's Annual Report to the AGM 13th May 2025

I am coming to the end of the first year of my role as Chair of the Bury u3a Trustee Board, and what a year it has been. When I took on the position, I had no idea how interesting it would turn out to be. I have thoroughly enjoyed every minute and look forward to another year.

I have a few well-deserved thanks to make to my fellow Trustee Board members.

Where would we be without our Vice-Chair and Group Co-ordinator? Naomi Richardson has worked tirelessly to add new groups to the ever-expanding activities that we offer. Not only that, Naomi sets aside much of her time to engage with Group Leaders, giving them support and encouragement, especially those who are new to their role. I also have to thank Naomi for taking over early last year when I needed temporary medical treatment.

Jim Hobbins is about to start his sixth year as our Treasurer. He has kept exemplary records, giving us financial advice when we needed it. Our Business Secretary, Sue Smith, has helped me a great deal in my first year. I have learnt so much from Sue about running the Board and all the different issues that come with my position. Brian Brewster has arranged some fantastic speakers and musical performers for our Monthly Meetings, as well as being our representative at the North West Region of u3a's. Keith McCarren, and his wife Helen, have produced some brilliant Newsletters, keeping us all up to date with current events. Annette keeps a record of groups with vacancies, arranges joining sheets at the Monthly Meetings where members can sign up and is on hand to offer advice about any of the groups. Mary Holland is currently working with Yvonne Brunnsden to compare our policies with those of National u3a and make our website easier to navigate. Mary and Yvonne have a huge task ahead but I have every confidence they can do it.

Other commitments meant that sadly three Board Members had to leave us during the year. I would like to thank them for the contribution they have made to Bury u3a in the time they have been on the Board. They are Karen Campell- Mathieson, Robert Abrahamsen and Sandra Mason. I wish them good luck for the future.

I want to thank those members who assist the Board with the essential back-up we depend on. Our Web Team, Richard Adams and Dave Lord; our Membership Secretaries Christine Kirkham and Philippa Marks; the Access Working Group run by Hilary McColl and Michele Clarke; the Finance Team, Jim Hobbins, David Gillett and Sandra Mason; our Venue Co-ordinator, Lyn Hughes and last, but certainly not least, Jo Mawdsley, my representative on the u3a Chairs' Forum and of course the organiser of our Coffee Mornings and Christmas lunches.

We have recently co-opted two new members to the Trustee Board, Yvonne Brunnsden and Trish Howard and we have a further two members who will join the Trustee Board at the AGM. They are Alistair Scott and Stuart Holt. I hope all of you enjoy your time on the Trustee Board.

I've left my biggest thanks to last. That will always go to the Group Leaders and their Second Leaders for their hard work throughout the year. Without them we would not have a Bury u3a. The amount of time they allocate to running their groups is incredible. We have had many members who have taken the step from being a member of a group to running a group. I appreciate what that takes, I've been there! **You all deserve a huge thank you!**

Highlights of 2024/2025

Our membership goes from strength to strength. At the time of writing, we have 848 members; 105 active groups and 10 Registration Groups. The latter groups are just waiting for enough members to allow them to be an active group. We have 69 Group Leaders and 45 Second Group Leaders; many of whom lead more than one group.

In September 2024 we held our Open Afternoon. This will now become a regular feature of our programme. It was well attended with participation from many of our groups; a raffle with proceeds going to charity and a beautiful display from both our Water Colour Painting Group and Photography Group. We gained quite a few new members once they saw what we had to offer.

The Development Sub-group has been meeting regularly and has introduced many new items to Bury u3a.

In November 2024 the Development Sub-group issued a survey to all members asking questions like 'Are there any Group activities that we do not offer that you would like to take part in?'; 'Would you be prepared to lead a group with help from the Trustee Board?'; 'What do you find most useful on the website?'; 'Do you read the monthly Newsletter?' and 'Have you any feedback for the Trustee Board? The response was very encouraging with some great ideas.

As a result, they have introduced eight new groups and are still working their way through the list. They have made changes to the Newsletter that have been very well received. Thanks to Keith and Helen. They have also introduced Name Badges at the Monthly Meetings; thanks to Hilary for arranging this.

Waiting Lists are always one of their top priorities. Work is on-going to create new groups where they can. Your help in achieving this would be greatly appreciated. Please contact me if you believe you can help.

They have embarked on a major exercise where they are looking to update our Policies, Procedures and Papers and consulting with the Charity Commission to bring our Constitution in line with the National Model Constitution. At the same time they are working with the Web Team to re-organise the web site to make it more user-friendly. This is a big exercise, but I'm looking forward to seeing the end result.

In December we held our first Christmas-themed meeting. Another suggestion from the survey. The Music Appreciation Group provided the seasonal music; refreshments were provided and we had a quiz, courtesy of Naomi. Thanks to everyone who helped to make this a great afternoon. We are arranging a similar event for December 2025.

In January we were all surprised at the number of members who turned up for the Monthly Meeting to hear a talk about J F Kennedy. We had to ask for more tables and chairs to accommodate everyone. I'm delighted to say that those numbers have continued throughout 2025.

In February we held a New Members' Day at the Unitarian Church. Again, it was very well attended. Each of the Trustee Board members explained more about Bury u3a, including a history of our development; our groups; setting up new groups and how members could contribute if they wished. The Trustee Board were on hand to answer any questions.

In March, our usual venue, The Met, was unavailable and we used the Sanctuary in the Unitarian Church for the first time. It was a little different to what we were used to, but it all worked out well with a talk about the history of Israel.

In April, we held our Group Leaders Thank-you Day. We started with refreshments, followed by a short talk about our current groups. Then the Honey Badgers entertained us for almost an hour, then lunch and a quiz. We ended with a questions and answers session with all the Trustee Board. It was a really fun day to show our appreciation for all that the Group Leaders do for us.

What does the following year bring?

Firstly, our AGM on 13th May. Doors open at The Met, a little earlier than usual, at 12.30pm. We start the AGM at 1.00pm prompt. We need a quorum of at least 84 members, therefore please do your best to join us. At 1.30pm we have a speaker, Michael Knaggs, a local author who has published four books and is writing his fifth that features places local to the Bury area. This promises to be a very interesting talk.

In June we have arranged for the group Silhouette to play for us at the Monthly Meeting. They are a nine-piece band that play and sing popular songs from the 1960's. I know them well and I recommend that you try to join us on 17th June. More about that nearer the time. The entertainment for the rest of our Monthly Meetings has been arranged. You can find the details on the website.

If you would like to ask me any questions about this Annual Report, please contact me using the 'Contact a Member' on the website. Please do not 'reply' to this message as I will not receive it.

Thank you for reading my Annual Report and I hope to see you all at the Annual General Meeting in May.

Ian Worthington, Chair Bury u3a Trustee Board

BURY U3A

England & Wales - Charity number 1165090

Accounts

AGM Chair's report.

I agreed to take on the role of chair of Bury u3a for one year until we found a suitable person that can take the job forward.

I have found the time has gone very quickly and I have enjoyed most of it. I think it takes at least a year to get the hang of it to be honest, so I feel I've been muddling through as I go along.

This year has been a year of opening up following Covid, with people starting to feel confident to get involved and meet others. For some people, this has not been easy, and I'm glad that hopefully our u3a has helped people along the way. I don't think we yet understand the full impact that isolation had on older people's mental and physical health. The focus naturally was on the Covid infection but we must not ignore the whole person.

The chair's job at an AGM is to thank people who have made your u3a what it was in the last year. The risk is that I miss out significant people, who have put in a lot of effort, so I apologise in advance if that happens.

I would like to thank Mike Williams, our previous chair who has given me advice and support over the last 12 months. We have had a small board of trustees that have worked very hard. Thanks to Karen and Annie Lewis who are both vice-chair; Sue Smith, who is our secretary and has kept me on the straight and narrow, and Jim Hobbins who does a fantastic job of Treasurer and is up-to-date with all his accounts. Thank you to Naomi Richardson who took over the job of group coordinator from Sandra Mason and Jo Maudsley who did the job for years. Thank you to Jo and Sandra for your past support to group leaders. I hope that with more people on the board we can share the workload.

I would like to thank Philippa Marks and Christine Kirkham. who do a terrific job as Membership Secretaries and have been very busy especially over the last three months with the renewal process.

Many people are not aware of the work that goes on in the background, and this is especially true for Dave Lord and Richard Adams who are the IT experts and make sure that the Web is kept up-to-date and reflect what we want to put on it. I've never seen anybody so responsive to any request that's made so I would like to personally thank you both.

Some people say they do not look at the website and others may criticise the content of it, but it is only as good as we want to make it, so if anyone wants to help update or modernise our web pages, we would be grateful for the assistance.

I would like to thank the Accessibility Group for their ongoing work in identifying issues that we need to address to make sure that everyone has access to as many activities as possible. This is never ending work and again we are looking for volunteers to take this forward.

We lost the use of Manna House after lockdown but we have been very lucky with being able to book the Athenaeum for many of our groups.

I would also like to thank the staff of The Met who support us with our monthly meetings.

Finally, I would like to offer a heartfelt thanks to all the group leaders who do a lot of work, keep u3a going and keep us all interested, learning and keeping fit - without you, our u3a would fold.

So moving forward, I'm pleased to announce that Karen Campbell Mathieson has agreed to step up as chair with Annie and Naomi as vice chair. We have new members on the board who are Ian Worthington, Rob Abrahamsen, Brian Brewster, Keith and Helen McCarren.

That's it, thanks everyone.

Lyn Hughes
Chair



CHARITY COMMISSION
FOR ENGLAND AND WALES

Bury U3A 1165090

CC16a

Receipts and payments accounts

For the period from	Period start date 01/04/23	To	Period end date 31/03/24
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations	-	-	-	-	-
Gift Aid	1,759	-	-	1,759	-
Monthly meeting donations	-	-	-	-	-
Groups room hire	12,798	-	-	12,798	14,881
Subscriptions	10,850	-	-	10,850	12,747
Events	-	-	-	-	776
Event refund	-	-	-	-	-
Visits	1,226	-	-	1,226	1,029
Sub total (Gross income for AR)	26,633	-	-	26,633	29,433
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	26,633	-	-	26,633	29,433
A3 Payments					
Room hire – groups	15,827	-	-	15,827	15,868
Room hire – U3A business	-	-	-	-	-
Visits	1,120	-	-	1,120	940
Capitation fee	2,920	-	-	2,920	2,604
Magazine mailing	1,386	-	-	1,386	1,879
Christmas lunch	-	-	-	-	-
Printing, stationery & postage	184	-	-	184	96
IT costs	800	-	-	800	721
Advertising & Promotion	-	-	-	-	419
Speakers	1,270	-	-	1,270	527
Licences	59	-	-	59	-
Equipment	849	-	-	849	309
Sundries	-	-	-	-	99
Refund	176	-	-	176	66
Sub total	24,591	-	-	24,591	23,528
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	24,591	-	-	24,591	23,528
Net of receipts/(payments)	2,042	-	-	2,042	5,905
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	31,291	-	-	31,291	25,386
Cash funds this year end	33,333	-	-	33,333	31,291

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Barclays Bank account	33,333	-	-
		-	-	-
		-	-	-
	Total cash funds	33,333	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

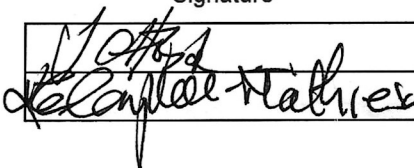
Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	None	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	None		-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use	None		-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities	None		-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	JAMES C HOBBS KE CAMPBELL-MATHIAS	10/5/2024 14/5/2024



Section A Independent Examiner's Report

Report to the trustees

Charity Name
Bury U3a

On accounts for the year ended

31 March 2024

Charity no
(if any)

1165090

Set out on pages

1 to 2

(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 31/03/2023.

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 the words in the brackets if they do not apply.

Signed:

Date:

7/5/2024

Name:

Derek Blank

Relevant professional qualification(s) or body

(If any):

Address: 5 Higher Croft, Whitefield, Manchester M45 7LY

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.

BURY U3A

England & Wales - Charity number 1165090

Accounts

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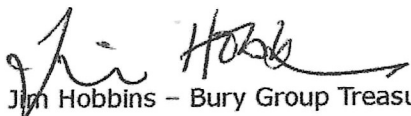
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That's it, thanks everyone.

Lyn Hughes
Chair

Bury U3A
 Balance Sheet
 As at 31 March 2023

		2023		2022	
		£		£	
Bank	Current a/c	31,291		25,306	
		<u>31,291</u>		<u>25,306</u>	
			31,291		25,306
Net assets			<u>31,291</u>		<u>25,306</u>
		£		£	
Shareholders' funds	Profit and loss account	25,306		17,585	
	Net Income	<u>5,985</u>		<u>7,721</u>	
			31,291		25,306
Total funds			<u>31,291</u>		<u>25,306</u>


 Jim Hobbins – Bury Group Treasurer


 Lynda Hughes – Trustee Board Chair

Bury U3A
Income / Expenditure Account
For the year ended 31 March 2023

		2023	2022
		£	£
Income	Gift Aid	-	1,751.69
	Monthly meeting donatio	-	26.80
	Refund	-	108.42
	Room hire events	197.60	-
	Room Hire Groups	14,683.77	9,240.10
	Subscriptions	12,747.01	11,784.36
	U3A Events	776.00	1,447.05
	Unidentified	-	15.00
	Visit Cartmel	581.00	-
	Visit Shibden	448.00	-
		<u>29,433.38</u>	<u>24,373.42</u>
Expenses	Accessibility	(125.40)	-
	Advertising and Promoti	(418.61)	-
	AGM room hire	-	(216.00)
	Capitation Fee	(2,604.00)	(2,744.00)
	Committee/leader expen	(88.14)	(146.76)
	Copyright licence	-	(60.00)
	Donations	(18.50)	(18.50)
	Equipment	(308.72)	(279.99)
	Events	(637.34)	-
	Group expenses	(150.19)	-
	I.T.Costs	(721.34)	(846.01)
	Magazine Direct Mailing	-	(1,838.30)
	Postage & stationery	(82.28)	(147.03)
	Printing	(14.00)	(374.94)
	Printing & stationery	-	(72.70)
	Refund	(66.00)	(25.00)
	Room Hire Groups	(13,571.62)	(7,951.00)
	Room Hire Monthly Meet	(1,296.00)	(306.24)
	Speaker Fees	(526.63)	(260.00)
	Subs admin	-	(20.00)
TAM distribution	(1,879.27)	-	
U3A Christmas lunch	-	(1,317.05)	
Visits	(940.00)	-	
Zoom session or similar	-	(28.78)	
		<u>(23,448.04)</u>	<u>(16,652.30)</u>
Net Income		<u><u>5,985.34</u></u>	<u><u>7,721.12</u></u>



Section A

Independent Examiner's Report

Report to the trustees

Bury U3a

On accounts for the year
ended

31 March 2023

Charity no
(if any)

1165090

Set out on pages

1 to 2

(remember to include the page numbers of additional sheets)

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basis of report

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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
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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:

7/5/23

Name:

Derek Blank

Relevant professional
qualification(s) or body

Associate of the Institute of Chartered Accountants in England & Wales

(if any):

Address:

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.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
Bury U3A 1165090

CC16a

Receipts and payments accounts

For the period from	Period start date 01/04/22	To	Period end date 31/03/23
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Visits	1,029	-	-	1,029	-
Gift Aid		-	-	-	1,752
Monthly meeting donations		-	-	-	27
Groups room hire	14,881	-	-	14,881	9,371
Subscriptions	12,747	-	-	12,747	11,784
Events	776	-	-	776	1,317
Event refund		-	-	-	108
Unidentified		-	-	-	15
Sub total (Gross income for AR)	29,433	-	-	29,433	24,374
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	29,433	-	-	29,433	24,374
A3 Payments					
Room hire – groups	15,868	-	-	15,868	7,951
Room hire – U3A business		-	-	-	522
Visits	940	-	-	940	-
Capitation fee	2,604	-	-	2,604	2,744
Magazine mailing	1,879	-	-	1,879	1,838
Christmas lunch		-	-	-	1,317
Printing, stationery & postage	96	-	-	96	595
IT costs	721	-	-	721	846
Advertising & Promotion	419	-	-	419	-
Speakers	527	-	-	527	260
Licences		-	-	-	60
Equipment	309	-	-	309	280
Sundries	99	-	-	99	214
Refund	66	-	-	66	25
Sub total	23,528	-	-	23,528	16,652
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	23,528	-	-	23,528	16,652
Net of receipts/(payments)	5,905	-	-	5,905	7,722
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	25,386	-	-	25,386	17,664
Cash funds this year end	31,291	-	-	31,291	25,386

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Barclays Bank account	31,291	-	-
		-	-	-
		-	-	-
	Total cash funds	31,291	-	-

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

Unrestricted funds to nearest £
 Restricted funds to nearest £
 Endowment funds to nearest £


Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	None	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	None		-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use	None		-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities	None		-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	JAMES C HOBBS	16/5/23