

ASHBOURNE & DISTRICT U3A

Reg. Charity No 1190748

TRUSTEE ANNUAL REPORT 2024

Introduction

Ashbourne & District u3a (Au3a) was established in 2007 and is registered with the Charity Commission (Reg'd No 1190748). It is a 'local' charity operating in the Ashbourne & District area of Derbyshire & Staffordshire and a part of the u3a movement in the UK.

Founded in 1982, the u3a - 'University of the Third Age' - movement encourages people no longer in full-time work to come together and enjoy learning in subjects of interest to them or undertake personal development through such activities as arts & crafts and recreational sports, pastimes & other activities. Its guiding principles are to promote informal interest and recreational groups covering a wide range of topics and activities as chosen by their members. There is no minimum age but there is a focus on people who are no longer in full-time employment or raising a family. The u3a movement is self-funded and members do not work towards qualifications but learn or undertake activities purely for pleasure.

The Third Age Trust (which is itself a registered charity with Reg'd No 288007) is the body which leads the u3a movement in the UK. More information about the u3a movement and the Third Age Trust can be found at <https://www.u3a.org.uk>. As at the present date, there are over u3a 400,000 members across over 1000 local u3as.

Au3a is one such local u3a. It is affiliated to the Third Age Trust but is a separate, independent charity.

Constitution, trustees and correspondence address

Au3a's constitution follows the model form of constitution for local u3as agreed between the Third Age Trust and the Charity Commission. It sets out the purposes of Au3a and contains provisions for the appointment of Au3a's trustees and their term of office, annual general meetings and general management and administration.

The trustees of the Au3a are appointed by election of the members at its annual general meeting or (for interim vacancies) co-opted in accordance with the terms of its constitution.

During the year ended 31st December 2024 the following persons acted as the trustees of Au3a:

S M Crawley (Chair)	J Dodd
P Faulkner (Vice Chair)	S E Hall
S Edmonds (Treasurer)	M Hall
A Keizer (Secretary)	E M Hoof
P Boura	J Watson
A P Cree	

With effect from 4th April 2025, P Faulkner and J Watson retired as trustees and Mr S W Davies was appointed with effect from that same date.

The trustees who hold officer positions pursuant to Au3a's constitution as at the date of this report are: S E Hall (Chair), S M Crawley (Vice Chair), S Edmonds (Treasurer) and A Keizer (Secretary).

The correspondence address of Au3a is:

The Stables,
Gravelly Bank Farm
Rodsley Lane
Yeaveley
ASHBOURNE
DE6 2DT

Au3a has a website at <https://ashbourne.u3asite.uk>.

Objects of Au3a

The objects of Au3a are set out in its constitution as follows: 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 Ashbourne and its and the villages and settlements on the Derbyshire/Staffordshire border.

There are no qualifications required to become a member and there are no limitations on membership. The annual cost of membership is modest (currently £13 per annum). A portion of this membership fee is passed to the Third Age Trust for the provision of such matters as insurance cover, IT support and other 'central' services.

Au3a currently has over 600 members and 50 or so groups covering a wide range of interests and activities including: Art, Art Appreciation, Badminton, Board Games, Book Group, Bridge, Canasta, Chatter, Chess, Choir, Cinema, Craft, Creative Writing, Current Affairs, Cycling, Disco & Social, Family History, French, Gardens, German, German Conversation, Golf, Guitar, Hiking, Jigsaw Exchange, Landscape & Heritage, Line Dancing, Mindfulness, Natural History, Pentaque x 2, Photography, Pickleball, Qigong, Quiz, Recreational Painting, Science & Engineering, Spanish, Strollers, Supper Club, Table Tennis, Theatre, Travel, Ukele, Walking, Weekend Lunch Group, Wine Appreciation & Yoga.

As is evident from this list of interest groups, the activities organised under the auspices of Au3a relate to subject learning in the arts, languages, nature and science, to crafts & other skills, and to recreational sports and pastimes. There is a significant social element to the activities which, in the opinion of the trustees, is an important aspect to membership of Au3a.

Apart from excursions associated with any particular interest groups, most of the activities organised by Au3a members take place in and around Ashbourne in the Derbyshire/Staffordshire border area, either at hired venues, public facilities or members' own homes. A monthly general meeting (i.e. not connected to any particular interest group) takes place which all members may attend.

Having regard to the activities undertaken through Au3a, its area of activity and the size and make-up of its membership (and the unrestricted access thereto), the trustees of Au3a consider that Au3a fulfils the requirement of public benefit to maintain its charitable status.

Chair's Report: achievements and performance

Set out below is the report made by Au3a's Chair (S M Crawley) to its recent AGM (April 2025):

"OUR POSITIVE TRAJECTORY CONTINUES

Ashbourne & District u3a has continued on its now well-established positive trajectory. We're in good health, and continue to grow. Just before Christmas we signed up 600th member Jenny who joined our Walking group. With new members come new ideas and energy, which benefits us all.

Our New Members Coffee Morning is now well established and is a useful forum for new members to meet each other as well as to meet and ask questions of the committee.

MORE GROUPS

We're still expanding our range of groups. Spanish is our newest, and this year also saw the establishment of Recreational Painting. Other groups have expanded and have extra sessions to accommodate more members.

MONTHLY MEETINGS

Our Monthly Open Meetings continue to thrive, the most recent one attracted the highest attendance to date. These meetings are enjoyed by existing members and are particularly important for new and prospective members to come along to find out more about us. Pat Faulkner, who has been our Speaker Finder, is stepping down from the committee this year after three years' hard work. I'm sure all of our attendees at the Monthly Open Meetings will join with me in thanking her for the great job which she has done. Pat Hall has volunteered to take over this role and has already booked sessions for the remainder of 2025.

CHANGES TO THE COMMITTEE

The Committee will change a little this year. I must step down after my maximum three continuous years tenure as Chair, but will stand to remain on the committee in a different role. We have two other committee members standing down, Pat Faulkner and Joy Watson. I've mentioned Pat already, and Joy has done a sterling job behind the scenes making sure our meeting administration runs smoothly. Mavis Lund will continue her crucial IT role but cannot be a committee member as she completed the maximum permitted term of nine years in 2023/24.

ASHBOURNE MAYOR'S AWARDS 2025

We've just been notified that our committee's nominations for two of our members, myself and Patti Green, have been successful. Patti has recently stepped down from leading our very popular Garden Group for several years and also was a long serving committee member. As well as a 'thank you' to the individuals, these awards are also an opportunity to spread the word about u3a in Ashbourne.

SPREADING THE WORD

Rising membership is a result of our promotional strategy, the aim of which is to ensure that local people in or about to enter their 3rd age are aware that there is a u3a in Ashbourne, that

they know something about what we do, and how to get in touch. Not all of them will need u3a in their life right now, but if and when they do, they need to know that we're here and what we are.

And so do their families and friends – we have many new members who have been sent in our direction by their younger family, friends or neighbours.

It's easy to think that all u3as are like Ashbourne but they are not. Some have declining membership, and some are closing due to a lack of members and / or volunteers to be on the committee and run them. Increasing awareness of u3a is a crucial element to keep us thriving.

TRADITIONAL MEDIA CHANNELS

We continue to use the local paper, distribute leaflets in a variety of places around the town, and have an annual exhibition in the library each September, timed to coincide with the national 'u3a Day'. Our 2024 Library exhibition, masterminded yet again by John Rawson to whom we are indebted, was on display in the lobby and in the library itself, and featured all of our many groups.

SOCIAL MEDIA

Traditional media channels continue to be important, but it is social media which is now the main driver of awareness. Our social media posts aim to attract viewers who, as a result, learn a bit about u3a. We post our weekly 'What's On' calendar as well as publicising group activities and events. A good post can be seen by more than 5000 viewers within 24 hours. Sue Hall and myself lead the activity, thanks also goes to the group leaders who post.

THE IMPORTANCE OF PHOTOS

Lovely photos, especially of smiling, happy people having fun together are a big draw. They attract viewers who may then pay more attention to the post and so find out a bit more about u3a. Thanks goes to all members who take part in providing photos or being in them.

Ashbourne u3a increasingly is seen as a beacon of good practice in the use of social media by u3as across the UK. Ever more u3as are using social media like we do, and are seeing the resultant benefits to their membership.

WEBSITE AND NEWSLETTER

These have developed substantially in the past few years, and I'd like to pay tribute to Mavis and to Newsletter editor Pamela Boura for their roles in achieving this. In this digital age these are crucial ways for people to find out what's on, where and when. Helen Bluff ensures that our non-digital members can get a physical copy of their newsletter each month.

IN SUMMARY

I see no reason why u3a shouldn't continue on its current very positive trajectory. I hope our members continue to enjoy u3a and that our various meetings and groups continue to thrive.

I'd like to thank all of our volunteers at all levels who are crucial to keeping our groups and u3a functional and legal. You may be on the committee, lead a group, step in when a leader isn't there, make the tea, organise rooms, pick up members to attend a group, help with money, etc – the list is endless. u3a is a cooperative organisation, which can only exist if people volunteer to come forward to keep it working at all levels.

AND FINALLY ...

I'd like to personally thank all committee members, other volunteers and members who have made the past three years work for me as Chair. This includes committee members who perform roles which go largely unseen by most members, but without which we can't function.

I've loved (99.9% of!) my time as Chair. Every role brings its challenges, but it also brings great reward. Being Chair of Ashbourne has been a privilege and a delight. I wish the next Chair well and will support them in every way possible.

During my seven years as a member of this great organisation I've come to realise that u3a isn't just a way to fill spare time. It's far more than that, it has a great social purpose. Once we're at a stage in life where work and/or family no longer occupy every waking moment, we all need something else to take its place that's positive and fulfilling. For some people this evolves naturally, but others (including me) need to work at it a bit more than that.

That's where u3a comes in. u3a offers a space where we can meet up and take part in activities in a social setting. We can do stuff, meet people and have fun – how great is that! 'Learn Laugh and Live' sums it up perfectly."

Accounting, income & expenditure and reserves

The accounts of Au3a in each financial year ending on 31st December are prepared on a receipts & payments basis (i.e. non-accrual basis) and receipts and payments pass through bank accounts in Au3a's name.

In the year ended 31st December 2024, the total income of Au3a was £43,261 (2023: £39,273) and its expenditure was £39,551 (2023: £37,194). The bulk of this income and expenditure related to membership fees and the activities of Au3a's interest groups.

As at 31st December 2024, the accumulated assets of Au3a comprised approximately £13,569 held as cash at bank (2023: £9,859). Out of this current balance, approximately £3,500 is due to be paid to Au3a's affiliated organisation, The Third Age Trust as referred to above, for services such as information technology provision and insurance cover. Au3a does not otherwise hold significant reserves of unspent income or have significant payments due to be made.

The accounts of Au3a for the year ended 31st December 2024 have been subject to independent examination by professional accountants and no matters of concern have been reported thereon.

Au3a does not hold any funds as a custodian trustee.

Report prepared by A P Cree, Trustee

14th April 2024

Ashbourne & District u3a

Statement of Accounts: all accounts

Printed 28th February 2025 17:09

Income & Expenditure, 1st January - 31st December

Start year	2024		2023	
Category	In	Out	In	Out
-Account Transfers			£21.01	£21.01
Audit (accounts)		£518.40		£480.00
Committee/Leaders Meeting	£58.00	£443.20		£405.00
Donations	£12.90		£21.80	£16.50
Expenses Membership		£10.39		£103.26
Expenses Newsletter		£122.06		£190.05
Expenses Stamps		£40.20		£213.07
Expenses Stationery		£275.99		£160.19
Group Art Appreciation	£200.00	£180.00	£182.00	£192.00
Group Art Learn to Paint	£220.00	£224.80	£1,543.17	£1,620.92
Group Badminton	£2,495.00	£2,564.79	£2,202.00	£2,138.53
Group Board Games	£74.00	£56.80		
Group Canasta	£928.00	£810.65	£949.00	£923.08
Group Choir	£640.00	£730.79	£1,087.50	£712.47
Group Craft	£291.00	£295.00	£284.00	£298.92
Group Current Affairs	£354.00	£346.49	£378.00	£354.96
Group Disco Dancing	£250.00	£210.00	£175.00	£195.00
Group Family History	£125.00	£133.50	£90.00	£74.00
Group French	£491.50	£517.50	£148.00	£100.00
Group Garden	£7,555.55	£7,895.65	£5,061.50	£4,964.25
Group German Intermediate	£364.00	£409.50	£524.00	£453.50
Group Guitar	£513.00	£491.00		
Group Landscape & Herit.	£2,029.63	£1,604.00	£1,515.85	£1,392.45
Group Line Dancing	£532.00	£532.00	£624.00	£624.00
Group Mindfulness	£60.02	£52.50		
Group Painting 4 Pleasure	£806.94	£813.70		
Group Photography	£454.00	£474.39	£393.00	£395.00
Group Pickleball	£3,612.50	£3,520.29	£1,285.00	£1,140.20
Group Qigong	£696.00	£696.00	£539.00	£451.00
Group Science & Eng	£633.75	£892.90	£2,637.15	£2,358.80
Group Strollers	£132.50	£108.50	£82.00	£80.00
Group Table Tennis	£2,173.00	£2,451.26	£2,532.00	£2,125.70
Group Theatre	£3,525.50	£3,054.00	£6,819.00	£6,898.00
Group Ukulele				£12.00
Group Wine Appreciation	£628.43	£480.50	£661.58	£525.35
Group Yoga	£868.70	£639.00	£442.00	£315.00
Groups Support			£14.50	£14.50
Membership	£8,276.10	£396.10	£6,268.70	£482.20
Monthly Meeting Cash	£2,132.73		£1,420.65	
Monthly Meeting Drinks		£863.75		£740.75
Monthly Meeting Hall Hire		£1,386.00		£1,176.00
Monthly Meeting Speakers		£744.00		£550.85
Monthly Meeting Xtras Dec		£11.50		£21.00
Promotions		£195.86		£140.40
Services/Gifts		£57.98		
Special Events	£1,290.00	£1,156.00	£990.00	£1,035.50
TAM	£706.72	£372.40	£356.40	£771.16
TAT Beacon		£555.00		£488.00
TAT Capitation		£2,108.00		£1,792.00
u3a Derbyshire Net				£5.00
Zoom Licence Fee	£130.50	£109.12	£25.00	£42.58
Sub-totals	£43,260.97	£39,551.46	£39,272.81	£37,194.15

Brought forward	£9,859.12	£7,780.46
Total	£13,568.63	£9,859.12

Balance Sheet

Current	£8,697.18	£5,477.56
Group Current	£3,542.19	£2,714.92
Group Leaders EOY	£1,329.26	£1,666.64
Total	£13,568.63	£9,859.12

Independent Examiner's Report to the Trustees of Ashbourne & District University of the Third Age

I report on the accounts for the year ended 31 December 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 charity's accounts carried out under section 145 of the 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do 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: 21/03/2025

PKF Smith Cooper Limited, 7 Compton Street, Ashbourne, Derbyshire, DE6 1BX