



Trustees' Annual Report for the period

	Period start date				Period end date		
From	01	Jan	2024	To	31	Dec	2024

Section A Reference and administration details

Charity name Richmond upon Thames University of the Third Age

Other names charity is known by Richmond upon Thames U3A

Registered charity number (if any) 1012343

Charity's principal address

52 Essex Court	
Station Road	
London	
Postcode	SW13 0ER

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Chris Barclay	Chairman	1 Jan – 20 Mar 2024	
2	Susan Wood	Secretary		
3	Carole Fletcher	Treasurer		
4	David Wood	Membership Secretary		
5	John Cardwell	Chairman	20 Mar – 31 Dec 2024	
6	Bob Litherland			
7	Geraldine Wear		20 Mar – 31 Dec 2024	
8	Charlotte Gregson		20 Mar – 31 Dec 2024	
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20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Examiner of the Accounts	Jeremy Barton	83 Stanley Gardens Rd, Teddington, TW11 8SY

Name of chief executive or names of senior staff members (Optional information)

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution First adopted 25 Feb 2003 and subsequently amended on 28 Feb 2006, 27 Feb 2007, 28 Nov 2012, 28 Feb 2018
How the charity is constituted (eg. trust, association, company)	Unincorporated association
Trustee selection methods (eg. appointed by, elected by)	Elected by the membership at the annual general meeting of the organisation

Additional governance issues (Optional information)

You may choose to include additional information, where relevant, about: <ul style="list-style-type: none"> • policies and procedures adopted for the induction and training of trustees; • the charity's organisational structure and any wider network with which the charity works; • relationship with any related parties; • trustees' consideration of major risks and the system and procedures to manage them. 	The Richmond upon Thames U3A is a member of and is affiliated to the Third Age Trust (reg charity no 288007). We follow the Principles of the U3A Movement as set out in the Mission Statement of the Third Age Trust.
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Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

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.
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Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

We have been very fortunate in Richmond u3a that our membership totals have stayed high and people are still joining us every month from word of mouth recommendations. Therefore our focus has been on finding an increasingly diverse range of subjects of interest to our existing members, rather than on attracting new members.

We are a co-operative with all our groups and other activities run by our members. Thus, joining u3a offers scope for helping as well as access to courses. We operate an impressive range of some 130 groups, each led by one of our members. Our model enables us to keep our costs and membership fees exceptionally low. In addition, we do not require payments from the Government or Local Authority. Indeed, we pay about £4 per member to the Third Age Trust each year, in addition to payments for the Third Age Matters magazine, but we are not part of a centralised organisation. Third Age Trust ensures we comply with Charity Commission rules and negotiates more favourable rates of insurance but otherwise we are independent

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

The organisation is entirely run by volunteers. None of the trustees/officers nor individuals running groups receive any payment from the organisation for their services.

Section D

Achievements and performance

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Summary of the main achievements of the charity during the year

Our membership numbers increased from 1365 at the end of 2023, to 1457 at the end of 2024, an increase of 7%, a remarkable rate of increase well in excess of what had been achieved in the previous few years. No promotion campaign had been conducted so it is difficult to know to what this increase can be ascribed.

The number of groups which members can join is currently around 130. Most of these meet either in hired premises, public venues or in private homes but around 30 meet on-line using Zoom or similar.

We attempt to hold a meeting on the last Wednesday of each month, open to all our members, with an invited guest speaker. These have also been used to disseminate information about our U3As activities. In 2023 we took the decision to relocate these meetings to Clarendon Hall in Twickenham from our previous venue of St Mary's Church. The hall has a significantly greater capacity and also a high quality and reliable sound system and projector/screen combination for showing slide presentations and videos. The average attendance figures since we moved to Clarendon Hall have exhibited a marked increase as a result. Unfortunately, four of our meetings had to be cancelled due to the hall being requisitioned by the council for various reasons.

During the year we published and mailed/mailed to all members two newsletters. These were in addition to the publications produced by the Third Age Trust which are mailed to all members five times a year.

We maintained our own website which contains information on all groups and events arranged by our U3A. During the year the website was successfully migrated to a new platform, SiteWorks. This will make it easier to maintain and synchronise the information with that on our membership system, Beacon.

The main mechanism for keeping members informed of future events and new groups is by email. We typically send out 4 to 6 emails a month to all those of our membership who are on email (around 99% of the membership).

David Wood, our Membership Secretary, has invested a lot of effort in trying to maximise our use of the membership system, Beacon. Among other initiatives, he has successively introduced on-line renewal of subscriptions using the Beacon Members' Portal. This not only makes it easier for our members to renew but considerably reduces the workload of our Treasurer.

Section E

Financial review

Brief statement of the charity's policy on reserves

We try and maintain a minimum balance on our accounts equivalent to 3 month's worth of operational expenditure – currently equivalent to £9,000 – though because the bulk of our income is received during August and September when members pay their annual subscription, the balance during the preceding summer months is inevitably somewhat lower.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

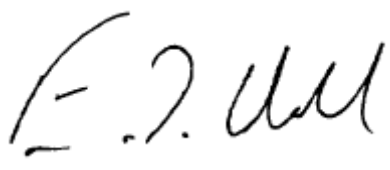
Our principal source of funding is the annual subscription. Single members pay £15 p.a.; joint members pay £25 p.a. for two people at the same address. These rates have been maintained at the current level for the last 12 years.

Section F Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Ernest John CARDWELL	Geraldine WEAR
Position (eg Secretary, Chair, etc)	Chairman	Secretary
Date	6 May 2025	

Richmond Upon Thames u3a

Year ended 31st December 2024

	<u>Year to 31/12/2024</u>		<u>Year to 31/12/2023</u>	
	£	£	£	£
<u>INCOME</u>				
Subscriptions	22,565.87		22,367.00	
Group Members' Contributions	18,591.30		14,773.01	
Coach trips	2,445.00		1,214.50	
Bank Interest	163.17		-	
Gift Aid	3,943.24		3,809.00	
		<u>47,708.58</u>		<u>42,163.51</u>
<u>EXPENDITURE</u>				
Monthly meeting speaker fees	646.00		1,197.00	
Monthly meeting room hire	924.00		1,200.00	
Monthly meeting catering	275.96		112.84	
Printing and Stationery	3,401.92		5,403.37	
Postage	2,288.14		2,974.70	
Group room hire	20,042.42		15,232.22	
Group Leaders' and Volunteers' lunches	2,888.96		2,790.00	
New Members Lunches	-		535.46	
IT costs and Communications	2,053.24		2,535.37	
National U3A News	4,485.48		3,095.50	
u3a Membership Charges	5,692.00		5,636.00	
Coach trips expenditure	2,134.00		1,153.00	
Bank charges	143.00		262.04	
Copyright licence	64.20		64.20	
SW London Network	50.00		-	
Presents and Donations	-		35.00	
		<u>45,089.32</u>		<u>42,226.70</u>
SURPLUS OF INCOME OVER EXPENDITURE		<u><u>2,619.26</u></u>		<u><u>- 63.19</u></u>

**Independent Examiner's Report to the Trustees of
The Richmond upon Thames University of the Third Age**

I report on the accounts for the year ended 31 December 2024.

Respective Responsibilities of Trustees and Examiner

The charity trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144(2) of the Charities Act 2011 (the 2011 Act)) and that an independent examination is required.

It is my responsibility to:

- examine the accounts under Section 145 of the 2011 Act
- to follow the procedures laid down in the General Directions given by the Charity Commission (under Section 145(5)(b) of the 2011 Act; and
- to state whether particular matters have come to my attention.

Basis of the Independent Examiner's Report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with these records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present 'a true and fair view' and the report is limited to those matters set out below.

Independent Examiner's Statement

In connection with my examination, no matter has come to my attention:

1. Which gives me reasonable cause to believe that in any material respect the trustees have not met the requirements to ensure that:
 - a) proper accounting records are kept in accordance Section 130 of the 2011 Act and
 - b) accounts have been prepared which accord with the accounting records and which comply with the accounting requirements of the 2011 Act; or
2. To which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Jeremy Barton

Jeremy C. Barton

Date:

26/2/25

83 Stanley Gardens Road, Twickenham TW11 8SY