



## Trustees' Annual Report for the period

	Period start date			T o	Period end date		
	1 <sup>st</sup>	January	2023		31 <sup>st</sup>	December	2023
<b>From</b>							

### Section A Reference and administration details

Charity name

Cestria U3A at Chester-le-Street

Other names charity is known by

Registered charity number (if any)

1163334

Charity's principal address

Available from Charity Commission Website

Postcode

#### 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)
Available from Charity Commission Website			

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**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

**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
How the charity is constituted (eg. trust, association, company)	Unincorporated Association
Trustee selection methods (eg. appointed by, elected by)	Elected by members at AGM

**Additional governance issues (Optional information)**

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

- 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 charity is a member of the University of the Third Age and adopts the policies and procedures as set by the Third Age Trust.

The major risk to the charity is the lack of forthcoming volunteers to adopt trustee and officer roles. This is extremely difficult to manage, and we rely entirely on the goodwill and willingness of trustees to continue in their roles.

Cestria U3A is a member of:

1. Northumbria Region U3A. A formal network covering all U3As in the region defined by HM Government as the North East, holding regular meetings and events.
2. An informal network with 4 other U3A's based in Washington and Houghton le Spring. Under this arrangement members of the network U3As may attend interest groups of any of those member U3As. There is also cooperation between the chairmen of those U3As in discussing matters of common interest.
2. Membership of the Regional Group Co-ordinators' Zoom meetings.

Induction and Training – The Third Age Trust provides regular trainer-led training for committee members, officers and group leaders as appropriate.

As ever, the principal risk to the charity is the unavailability of volunteers to come forward and assist with interest groups and the general running of the u3a. This was brought to a head by the impending retirement of the Chair.

A key financial reliance is the retention and growth of the membership. We keep a close eye on numbers and are keen to ensure that members are retained.

An increasing risk is the age demographic of our membership and we have noted a number of resignations due to advancing years. It is difficult to know what to do to increase our profile in the community, given the competing demands on new retirees in terms of family and economic needs.

## 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.

**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)**

Activities are focussed as follows:

1. Monthly meetings:

There has been reasonable attendance but a drop compared to pre-covid times

Monthly meetings also give members access to our Bulletin Boards and PowerPoint Display which detail the various group and planned outings activities. Information of a more general kind is also available.

2. Interest Groups

A couple of groups have had to close . However, a Groups Coordinator was appointed in February 2023 to provide continuing dedicated support to groups and support to new groups wishing to form.

3. Trips and outings (Educational and Social)

A number of members are willing to organise outings and trips to places and events of interest. The activities are open to all members but must be fully funded.

We are extremely lucky in having volunteers who organise such events.

4. Quarterly Newsletter. This is sent to members either electronically or by post and contains information and articles of interest to all. There is much reporting of group and outings activities with the aim of fully informing and involving members with their u3a

5. Our website has been substantially enhanced and improved such to make it more informative to members and the general public

We confirm the trustees have had regard to the Charity Commission's guidance on public benefit. The charity is open to all, subject to payment of the membership fee.

**Additional details of objectives and activities (Optional information)**

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

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

The contribution made by volunteer members in organising and running:

- Monthly Meetings
- Membership Administration
- General Administration
- Interest Groups
- Visits and outings
- Luncheon Club
- Newsletter

cannot be overstated. There is no doubt at all that without the involvement and participation of these individuals our U3A would not be as successful as it has been.

## Section E Financial review

### Brief statement of the charity's policy on reserves

Six months of normal outgoings will be held at all times in the charity's bank accounts.

### Details of any funds materially in deficit

None

### 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.

The Principal sources of funds are:

1. Annual subscriptions from members
2. Entrance fees charged at monthly meetings
3. Fees charged to those members that attend interest groups where a room hire fee is payable.

Fundraising has supported all activities of the charity including the cross-subsidisation of small groups who could not otherwise fund their room hire fees. This aspect remains under scrutiny such to ensure fairness to all groups.

## Section F Other optional information

An example of group activity : The Wednesday walking group walked from 8th February until 22nd November having a break over the winter months. The group walks 2-3 miles on the second and fourth Wednesday of each month, walking in various local places, with several of the walkers leading some of the walks. All the walks are planned for the year.

The Walking Group walk about 5 miles every Friday weather permitting. The walks are decided on the Tuesday and the walkers informed by email as to the location to meet.

An example of larger-scale events: In March 2023 we held a History Wardrobe event and buffet lunch. This was attended by 100 members from across our local u3a network

We have begun to introduce members' coffee mornings as a CAMEO event – "Come and Meet Everyone"

## Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s)

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Full name(s)

Robert Berry	
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Position (eg Secretary, Chair  
etc)

Chair	
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Date

1/1/24
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