

TRUSTEES REPORT and CONSOLIDATED FINANCIAL STATEMENTS

For the period ended 31st March 2026

1. REFERENCE AND ADMINISTRATION DETAILS

Name: Romsey & District u3a

Registered Charity No. 1082501

We are affiliated to the Third Age Trust

Address: 2 Windfield Drive Romsey SO51 7RL

2. OBJECTIVES AND ACTIVITIES

The formal objective of the charity is *'the advancement of education, and in particular the education of older people and those retired from full time work, by including associated activities conducive to learning, and personal development in Romsey and the surrounding areas.*

We provide a programme of activities which includes monthly speaker meetings and regular interest group activities which provide members with physical, mental and social stimulation to support active living. Members learn from each other through sharing their knowledge, skills and experience. Our interest groups provide opportunities for **physical activities** e.g. pickleball, walking and table tennis **learning activities** e.g. genealogy, bridge and French and **creativity** e.g. Art, creative writing and singing and **study** e.g. art appreciation and philosophy. A full list of current interest groups and contact details can be found on our website.

Public Benefit: Due regard has been given to complying with public benefit guidance. The charity proactively encourages and supports anyone in the local community who is no longer in full employment or raising a family to learn through mutual education, creative and leisure activities.

3. STRUCTURE, GOVERNANCE AND MANAGEMENT

The charity is governed by its constitution adopted on 30th March 2022 and is managed by a committee of a maximum of 12 with the trustees elected annually. During the period of this report, it comprised

CHAIR & Accessibility Officer	Alan Crisp	Elected 2025
VICE CHAIR	Tim Holmes	Elected 2025
SECRETARY	Trisha Meredith	Elected 2025
TREASURER	Linda Meyer	Elected 2025
TRUSTEE [joint membership secretary]	Jan Tudball	Elected 2025
TRUSTEE [joint membership secretary]	Jean Wilks	Elected 2025
TRUSTEE [groups co-ordinator]	Margaret Marchbank	Elected 2025
TRUSTEE	Diana Blakeman	Elected 2025

The trustees held 6 meetings during the year and have been assisted by other member volunteers whose contributions have been invaluable.

Our u3a is part of the Southeast Hants network. Representatives of u3as within the network attend the meetings and are provided with updates from the regional trustee for the Third Age Trust. The meetings also provide the opportunity to share ideas and good practices. We also receive a monthly update from The Third Age Trust – a current focus is shaping the future of the u3a

4. THE FUTURE OF ROMSEY AND DISTRICT u3a

As with many organisations in the voluntary sector we continue to find it difficult to attract members to volunteer to join the committee as trustees and officers to maintain the running of our charity. Our legally binding constitution requires us to have a Chair, Vice Chair, Secretary, Treasurer and at least one other trustee.

As a result of this seemingly continuing trend the majority of the trustees' time and attention this year has once again been focused on what can be done to ensure the survival of Romsey & District u3a. We have continued to communicate this to members through notices in the quarterly newsletter direct email and face to face at the members monthly speaker meetings. We invited members who were interested to join one of our trustee meetings to find out first hand a little more and from this we were successful. Four attended and indicated they would be willing to join the committee at the AGM in May as trustees and officers. This was an excellent result and meant that R&D would be in a position to at least continue for a further year.

5. ACHIEVEMENTS AND PERFORMANCE

Operational roles

Our u3a is run for members by members who volunteer to undertake specific roles. Some are trustees, others lead interest groups and look after the arrangements and sourcing of speakers for our monthly members meetings and others undertake communication activities, editing and circulating a quarterly newsletter and keeping our website updated and relevant.

We have about 60 volunteers and without them the charity would be unable to operate. Every person who does something for our charity be it trustees, group leaders, the refreshments team is a volunteer, and the trustees would like to place on record their thanks and appreciation to each and every one for their valued support.

Membership

As most years membership has fluctuated but 67 people were attracted to join our u3a this year leading to a closing balance of 636. Jan Moody has continued as our 'new member buddy' which has been a valuable contribution.

Communication with Members

We have a new publications manager Mike Tudball who now produces the quarterly newsletter which provides updated information on interest groups, advertising new groups that have formed together with editorial and photographs leaders have provided of group activities. The newsletter is sent out to all members via email, with a printed copy posted or hand delivered to members who do not use or have access to email. The newsletter is also made available on our website. The publications manager frequently receives positive feedback from members on the content.

Our previous publications manager John Dick adopted the role of webmaster ensuring the web pages are kept up to date posting news and pictures from group leaders, the programme of speakers for the monthly members meetings. All policies are also available on the website.

Throughout the year we have maintained around 45 interest groups with changes throughout this time of new leaders, new groups and ones that have closed.

Changes April 2025 – March 2026

New Group	- The two milers walking group
Closed Groups	- Garden Visits 2
	- Latin
	- Literature
	- Bird Watching
	- Cinema
	- Horticulture

2 Crime Fiction groups have now merged

Monthly meetings and other events

Gill and Timothy Bailey continued in the post of Programme Secretary for this year and have again provided an excellent programme of speakers with wide ranging topics. The meetings continue to be very well attended with the majority staying on for refreshments and social time.

Risk Management

The trustees recognise they have a duty of care to their members and as part of this have currently been reviewing the risk assessment template for interest group leaders to complete. The Safeguarding Policy was reviewed and updated where appropriate and is available on the website. All other policies will be reviewed this coming year and again updated as necessary.

Website

The website is managed by John Dick together with our Zoom licence although there has been very little use of Zoom again during the year. John also manages the email accounts used by the trustees and has been exploring other providers.

6. FINANCIAL REVIEW

Reserves

We maintain a reserves policy which states we should maintain a reserve of 50% of our running costs averaged over the preceding three years.

Subscriptions

The trustees agreed to reduce the annual subscription to £5.

Financial Overview

Our finances are organised into three bank accounts, Main, and Reserve and the Groups on a receipts and payments basis. All accounts are managed by the Treasurer who is also a signatory together with the secretary and vice chair. Our main source of income is from membership subscriptions and the claiming of gift aid on eligible subscriptions.

All three bank accounts had an independent auditor examine and authorise them.

Outgoings

The Third Age Trust subscription includes the yearly membership fee, cost of the Third Age magazine [TAM] plus the annual fee for use of the Beacon Membership database. We purchased one yearly licence for Zoom and continue to pay for speakers at the monthly members meetings in the Crosfield Hall Romsey plus the hire of the venue. In October year we held an afternoon tea event in the Crosfield Hall for new members with many of the interest group leaders attending to provide information on their specific group. The trustees gave a presentation focusing on the new website and the useful content that can be found. The Secretary promoted the need for new volunteers to consider joining the committee to ensure R&D u3a can continue to thrive in the community.

Main current account

The balance at the beginning of the year [01.03.2025] was £16127.76 and ended with a balance of £10926.88

Reserve account

The balance at the beginning of the year [01.03.2025] was £6101.65 and ended with a balance of £6181.95

Groups account

The balance at the beginning of the year [01.03.2025] was £7962.37 and ended with a balance of £8642.77

8. OUTLOOK

The trustees had concerns that R&D would not be able to continue after this current year due to the lack of volunteers coming forward to join the committee with an indication they would put themselves forward at the AGM in May 2026. The Secretary emailed members expressing this concern and the possible outcome and this message was also included as an editorial from the trustees in the quarterly newsletter. At each bi-monthly meeting the future was an ongoing agenda item. The final email went out to members at the beginning of December as a final call before we consulted about the closure. The two key roles that needed to be filled was that of Chair and Treasurer. If we achieved finding volunteers for these the remaining trustees would be willing to stand for a further term.

Due to the limited resources of trustees' time due to family commitments and ill health we were unable to put on any large events for members which is what we were hoping to do.

The possibility of coming together with Archway u3a was also discussed for a possible future way forward and the Secretary had a meeting with their Chair to discuss. He also thought this was worth exploring and as a result a proposal was circulated to both sets of members. This will be an agenda item for the AGM to be voted on and if agreed R&D and Archway will form a small working group to progress.

The aim is to have a thriving u3a for Romsey.

The Trustees
Romsey & District u3a