



Trustees' Annual Report for the period

From 1 May 2022 To 30 April 2023

Charity name: Kings Norton & District u3a

Charity registration number: 1167838

Objectives and Activities

Summary of the purposes of the charity as 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 in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	We hold a meeting once a month – which all members are entitled to attend – involving refreshments and a one hour talk by an appropriate speaker. At certain times of year (i.e. Christmas), the speaker might be replaced by a social gathering (party). We also have around 39 special interest groups, meeting at different times and frequencies during each month. These are open to all members, and a small fee is charged for attendance, to cover the hire of the hall or refreshments (dependent on where the meetings take place).
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Our main activities are as set out above. The trustees have had regard to the CC's guidance on public benefit.

Achievements and Performance

Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	As already stated, our main focus is on the continuing education of those who have reached retirement – as demonstrated through our speaker meetings and interest groups. Of course, there is also the wider spin off for our members of coming together in a like-minded community. We try, where possible, to encourage this community feeling – which has become increasingly important as we emerge from Covid. However, there was also the growing use of online meetings (via Zoom and the Murthy talks) during the Covid lockdowns – trying to keep members in touch and engaged.
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Financial Review

Review of the charity's financial position at the end of the period	Income = £9,552.52 Expenditure = £6,169.40 Income over expenditure = £3,383.12
Statement explaining the policy for holding reserves stating why they are held	The monies held at the end of the financial year total £6,909.48. This will fluctuate from year to year but we need to ensure that we have sufficient monies in reserve in order to meet all our debts.
Amount of reserves held	See above.
Reasons for holding zero reserves	n/a
Details of fund materially in deficit	n/a
Explanation of any uncertainties about the charity continuing as a going concern	n/a

Structure, Governance and Management

Description of charity's trusts:	
Type of governing document	Constitution, approved by the CC and the u3a Trust
How is the charity constituted?	An unincorporated members association
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Trustees are selected from the membership, are elected/re-elected at each AGM, and serve a fixed term, as laid down by the constitution.

Reference and Administrative details

Charity name	Kings Norton & District u3a
Other name the charity uses	n/a
Registered charity number	1167838
Charity's principal address	59 Bryony Road, Selly Oak, Birmingham B29 4BY

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Date of original appointment to role	Name of person (or body) entitled to appoint trustee (if any)
1	Linda J Curry	Chair	6 July 2021	KN u3a board of trustees, but ratified by u3a membership at AGM
2	Vicki Hone	Vice Chair	6 July 2021	
3	Lorna Brown	Business Secretary	6 July 2021	
4	Jennifer Snashall	Treasurer	28 March 2017	
5	Pauline George		6 July 2021	
6	Beryl Blood		28 March 2017	
7	Margaret Lusher		6 July 2021	
8	Paul Smith		28 March 2017	
9	Helen Kempster		6 July 2021	

Exemptions from disclosure

Reason for non-disclosure of key personnel details

n/a

Declarations

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

Signed on behalf of the charity's trustees

Full name(s)	Linda Jane Curry
	Position (eg Secretary, Chair, etc) Chair
Date	19 April 2022