

SHERBORNE u3a

Website: u3asites.org.uk/sherborne/home

ANNUAL REPORT FOR THE YEAR ENDING 31 AUGUST 2025

Constitution

Sherborne u3a is governed by its constitution which was adopted on 16th March 2001 and amended on 20 October 2013, 17th October 2018, 16th October 2019 and 20 October 2021. It is an unincorporated association.

Sherborne u3a is a charity registered in the UK, with Registration Number 1085915.

Objectives

The objectives of Sherborne u3a are:

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, in Sherborne, Dorset and its surrounding locality.

Methodology

Sherborne u3a offers learning and new experiences in groups. New friends are made and the quality of an aging life can be improved especially for those retiring to the town who, being new to the area, may want to develop new interests.

Members volunteer to be group leaders in a subject area that are experienced in and passionate about and often well qualified.

Members can join these groups at any time throughout the year depending on numbers and availability. Waiting lists are maintained to accommodate as many as members as possible. Every effort is made to make the groups as inclusive as is reasonable.

Committee Members/Trustees

All Committee members are also Trustees of Sherborne u3a.

The principal officers for 2024/25 were:

Chairwoman	Ms Sue Thomas Peter
Secretary	Mrs Elizabeth Wills
Treasurer	Mr Douglas Fuller, Treasurer Elect

In addition to the principal officers the following were Committee members and trustees: John Dale, Membership Secretary, Suzanne Martin, Newsflash Editor, and Diana Stephens.

The election of members of the Committee is carried out at the Annual General Meeting. The principal officers are appointed by the Committee at its first meeting after the AGM.

In exercising their duties the Trustees have due regard to the guidance issued by the Charity Commission on Public Benefit considerations and all other relevant issues.

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Independent examiner: Mr Robin Wright
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Report on 2024/25

Membership numbers and group activities continue to grow and have now reached 846 members during 2024/25. This figure includes 55 group leaders. The annual membership currently remains at £20.

At the end of 2024/25, there were 66 interest groups in operation, covering a wide range of activities ranging from art, languages, literature, music, bridge, through geology, table tennis, hiking and walking with groups such as pickleball attracting many members.

Regular monthly coffee mornings open to all members and potential members continued during the year. Some successful social events were held; a Christmas Festive Tea and an extravagant Summer Showcase coffee morning with a performance by Brenda Newcombe's exercise group, while other groups presented their activities and achievements as appropriate. As usual a lunch was held for Group Leaders in recognition of the vital role they play in the success of our u3a.

The Committee met on five occasions between 1 September 2024 and 31 August 2025.

New committee members are always welcome and are invited to approach the Secretary for a Nomination Form.

Sherborne u3a follows the guidance provided on financial matters by the Third Age Trust and the Charity Commission. The Committee continues to ensure financial governance takes place in line with our overall Financial and Financial Reserve Policies and is comfortable that potential financial risks are well managed. These policies were updated during the 2023/24 academic year.

Sherborne u3a's income is derived almost solely from members' subscriptions and tax refunds under the Government Gift Aid scheme.

The financial position for 2024/25 shows a small profit of £2,624.79 held at 31 August 2025. Funds do not include advance subscriptions paid prior to the year end nor a Gift Aid claim.

We believe the annual membership fee of £20 represents good value to the individual. Having introduced the opportunity to pay by bank transfer, most members are happy to pay this way and others paid by debit/credit card at the annual Enrolment Day. A very small number still prefer to pay by cheque or cash.

The Committee has decided that the subsidy for hall hire charges should remain at 33.3% from 1 September 2025. Extra members in groups can offset this cost although the cost to individuals is relatively small.

The Committee sees no immediate need to increase the subscription rate (currently £20).

Sue Thomas Peter
Chairwoman

2025