

Trustees' Annual Report and Accounts for the year ending 31 March 2026

<u>Trustees</u>		<u>Appointed</u>	<u>Max. Term</u>
Jonathan Babb	Chair	AGM 04/05/2026	3 years
Yvonne Connell	Secretary	AGM 06/05/2024	3 years
Irene Twinn	Treasurer	AGM 05/04/2025	3 years
Ray Hodgson	Groups Co-ordinator	AGM 05/05/2026	1 year
Sue Hendry		AGM 04/05/2026	1 year
Trevor Abell		AGM 04/05/2026	1 year
John Seavers	Membership Secretary	AGM 04/05/2026	1 year

Contact Address

Irene Twinn 3 Broomhill Avenue Perth PH1 1EN

Recruitment and Appointment of Trustees

Trustees (with the exception of those co-opted) are appointed by members at an Annual General Meeting which is ordinarily held in April or May. The trustees for the year 2023-24 were appointed on the dates shown above.

Governing Document

The organisation is a charitable unincorporated independent organisation and the purpose and administration arrangements are set out in the constitution.

Charitable purpose

The charitable purpose of The U3A is 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 Perth and its surrounding locality.

Activities, Achievements and Performance

The year for Perth U3A marked a very successful year with increased membership and an increase in the number of groups added. Members of Perth U3A were again able to participate in a range of over 70 interest and activity groups, all of which operate on the self-learning principle. Participation is limited only by restrictions on membership numbers of some groups. Groups range from scholarly, philosophical and technical topics (meeting predominantly indoors) and expressive, creative and physically active areas of interest (meeting either indoors or outdoors) – though there can be significant overlap. Interest groups have been run principally on the basis of a meeting every four weeks during the eight four week “Sessions” which runs from September to April, though increasingly groups seek to meet more frequently than this. Some groups also organise a limited number of summer activities, in particular, walking and golf groups meet on an *ad hoc* basis during the summer months. In addition, during the main season, eight Open Meetings, designed to appeal to the whole membership and guests are organised. Those unable to attend in person have the facility to watch proceedings via online streaming.

It is gratifying to be able to report that membership numbers have risen in 2025-2026 by over 10% to a total of 560.

Trustees Remuneration and Expenses

The Trustees do not receive any remuneration or expenses. Individual trustees may be reimbursed for personal costs incurred on behalf of the charity, subject to prior approval of the expenditure by the committee of management.

Finances: Receipts and Payments

The 2025-2026 Receipts and Payment summary, and end of year bank balances are attached together with the formal statement by the Independent Financial Examiner.

Over the year finances have remained healthy. The greatest outgoings are for accommodation – both indoor and external venues and the charity’s ongoing leased accommodation in Perth’s Glasgow Road. The membership year runs from July to June and at the end of the financial year in March 2026 we had made a gain of £1500 to go forward to allow us to provide for extra accommodation that may be required and any unknown increase in charges for current accommodation. The budget for 2026-27 was set on the basis that things were very much thriving. Furthermore, as the membership numbers and therefore subscription income (by far the charity’s greatest source of funds) in the year slightly exceeded expectations so there will be no rise in the subscription level for 2026-2027. It will remain at £28.00.

Membership renewal via PayPal has continued to be a popular option and will be continued in the year ahead. We have purchased a card reader and have a card account with SumUp to facilitate the receipt of membership subscriptions.

Perth U3A maintains a separate account to facilitate social events for its members. We had a quiz night which was very popular and also a Christmas lunch. It is hoped this may be built upon with more social events in 2026-27

Financial Reserves Policy

In accordance with good practice, the Trustees have formally agreed an appropriate level of financial contingency reserves. The agreed figure for 2026 - 2027 reserves is £4,000.00 as it had been for the preceding year.

The end of year Financial Statement has been approved by the External Examiner Fiona Brown, has also been approved by all Trustees, also the members at the AGM and is displayed on the Perth U3A website.

The Reserves Policy will be periodically reviewed by the Trustees.

Signed on behalf of all Trustees

.....Irene Twinn.....

IRENE TWINN, Treasurer

Date: 9 May 2026