



From **01/04/25** **To** **31/03/26**

Charity name: Mawdesley & Neighbouring Villages U3A

Charity registration number: 1128556

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	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 residing in Mawdesley and Neighbouring Villages
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.	Para 1.17 and 1.19	Mawdesley & Neighbouring Villages U3A has a weekly Wednesday Coffee Morning where members and prospective members can come to see what activities and forthcoming events are available. The activities and interest groups are split into various types and open to all members with the range allowing for different levels of physical or mental ability, and are run and organised by members. It also provides a friendly environment and mutual support among the membership to aid both physical and mental health. Members suggest new activities that may be trialled or launched if there is sufficient interest.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have regard to the guidance issued by the Charity Commission on public benefit and believe that this is satisfied as the Association is non-profit making as any surplus is used in future years to support its charitable objectives and purposes.

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.	Para 1.20	As Mawdesley & Neighbouring Villages U3A had a 5% increase in membership this year. Attendances at most groups and events are getting back to the levels of those before the pandemic. 1 new group was started. Weekly newsletters are sent out by email.
---	-----------	---

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Mawdesley & Neighbouring Villages U3A is in a sound financial position with regular income and strong reserves.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Mawdesley & Neighbouring Villages U3A aim to keep Unrestricted Reserves of between 6 and 12 months expenditure
Amount of reserves held	Para 1.22	£27403
Reasons for holding zero reserves	Para 1.22	Not Applicable
Details of fund materially in deficit	Para 1.24	None
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	Not Applicable

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Membership Fees
Investment policy and objectives including any social investment policy adopted	Para 1.46	No Investments
A description of the principal risks facing the charity	Para 1.46	The main risk is the loss of members and group leaders to run the many activities

Structure, Governance and Management

Description of charity's trusts:		None
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution dated 17 th Oct 2012
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Unincorporated 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	Para 1.25	Election by members at AGM

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's organisational structure and any wider network with which the charity works	Para 1.51	Member of the U3A Trust
Relationship with any related parties	Para 1.51	Not Applicable

Reference and Administrative details

Charity name	Mawdesley & Neighbouring Villages U3A
Other name the charity uses	
Registered charity number	1128556
Charity's principal address	Hillside House Bluestone Lane Mawdesley, Ormskirk Lancs.
Postcode	L40 2RJ

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)
1	Stuart Kirkman	Chair		
2	Susan Jones	Vice-Chair		
3	Jane Clarke	Secretary		
4	Roger Darling	Treasurer		
5	Stephen Doyle			
6	Marie Gornell			
7	Irene Molyneux			
8	Janice Parr			
9	Kathleen Williams			
10	Robert Baker			
11	Edward Southworth			
12	James Farrell		Resigned Feb 2026	
13	Michael Jolley			
14	Veronica Murphy			
15				
16				
17				
18				
19				
20				

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	Not Applicable
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	Not Applicable
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	Not Applicable

Exemptions from disclosure

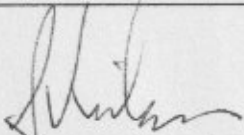
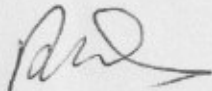
Reason for non-disclosure of key personnel details

Not Applicable

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Stuart Kirkman	Roger Darling
Position (eg Secretary, Chair, etc)	Chair	Treasurer

Date 25/8/16