



(Scottish Charity No SC028953)

**Trustees' Annual Report and Accounts
For the year ended 30 April 2026**

The Trustees are pleased to present to the Twenty Sixth Annual General Meeting their report together with the Treasurer's Report and accounts and Independent Examiner's Report for the year ended 30 April 2026.

Reference and Administrative Information

Charity Name: East Lothian u3a
Charity Number: SC028953

Current Trustees

Carol Skye	Chairperson
Celia Coulson	Deputy Chair
Ed Dee	Treasurer
Angela Gallery	Secretary
Fiona Lacy	Membership Secretary
David Taylor	Lectures Co-ordinator
Susan Kempson	Groups Co-ordinator- (resigned April 2026)
S. Anne Guthrie	Committee member
Christine Ferns	Committee member (resigned April 2026)

Structure, Governance and Management

Constitution

East Lothian u3a (the Charity) is an unincorporated association. It is governed by its constitution which was adopted on 16 June 2021 and amended on 15th November 2022.

Appointment of Trustees

Members of the Executive Committee, which meets approximately six weekly, are the Charity's Trustees. All Committee members are elected at the Annual General Meeting which is normally held in June. Under the Constitution there must be a minimum of five and a maximum of ten elected Committee members. Five committee members need to be Trustees. The Committee may co-opt a further two ordinary members as Committee members (with voting rights) if they consider it would be in the interests of the Charity to do so.

Management

The Committee is responsible for carrying out the general policy of the Charity and to provide for the administration, management and control of its affairs and property.

The committee members have to stand down at the AGM, but can be re elected en bloc if there are no challenges through other nominations.

Unfortunately, during the year, Susan Kempson,(Group Coordinator) Mike Radford (Treasurer) and Christine Ferns (general member) resigned and going forwards, David Taylor (Lecture Coordinator) and Ed Dee (Treasurer) have decided to resign as both have served for several years. David has taken on the revived newsletter and Ed remains our Beacon administrator and website manager. Thanks to all for their hard work and continued effort to support the organisation.

Relationships with other organisations

East Lothian u3a is a member of The Third Age Trust (TAT) which provides insurance, support and advice on the aims and principles of the Trust to local u3a groups in return for a capitation fee. Members can also receive a copy of the u3a Matters magazine, although some members are now choosing to read this online to save our funds, as we have to pay the postage.

East Lothian u3a is a member of the u3a in Scotland (UiS) which exists to facilitate and provide opportunities for u3as in Scotland to come together for conferences and study days and to encourage the formation of new u3as in Scotland.

East Lothian u3a works in partnership with the Volunteer Centre East Lothian (VCEL), East Lothian Council and Ageing Well.

As a registered charity, East Lothian u3a also works within the law, and abides by the rules of the Scottish Charity Regulator (OSCR)

Objectives and Activities

Charitable Purpose

'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.

The charitable purposes of East Lothian u3a may only be altered with the prior consent of the Office of the Scottish Charity Regulator (OSCR).

Activities and Achievements

Of the 41 groups registered with East Lothian u3a many meet in members' homes but others meet in a variety of venues, largely in Haddington. During 2024/25 a greater geographical spread of meeting venues was achieved, particularly for the open lectures. However, the Open Lectures, that are part of our charitable work, have now relocated to Haddington as it became apparent that other locations were not well attended.

Some members represented EL u3a at the Stirling Development workshop last October and the Chair represented us at the VCEL conference. More regular contact has been made with the Scottish Regional Reps of the Third Age Trust (TAT)

All Trustees attended induction training with VCEL and we have updated all of our Governance accordingly.

A Group Leaders meeting was arranged by Susan Kempson (until recently the Group Coordinator). This was very well attended and many group leaders had the opportunity to share their activities. A discussion was also held about affordability of venues, as outgoings have exceeded income in the last two years.

Leaders were asked to discuss this issue with their groups and some have managed to find cheaper venues.

All members have been sent an options paper and a voting method so that a decision about our financial future can be made in an inclusive and fair way. The results will be shared at this year's AGM.

Membership

Membership now stands at 522, a decrease of 35 since last year's report. More than half of new members have been introduced by existing members, so although we continue to promote our organisation through meetings with other community groups, posters, leaflets and public sector organisations, it remains the case that our best method of promoting ourselves is by telling other people about our u3a.

Future of the East Lothian u3a

Despite a reduction in membership, the East Lothian u3a remains a vibrant and valued organisation. Members volunteered to take on the essential officer/trustee roles thereby securing the legal charitable status of the organisation for 2025-2026.

The move to using the Beacon software has offered improved communication with the membership and less time-consuming administration for office holders and group leaders.

Financially the organisation has had increased costs, in the last two years, over and above the income generated from membership fees. An options paper and voting arrangements has been distributed to all members, to help select one of three sustainability options proposed by the committee. The results will be shared at the 2026 AGM. Currently, using reserves, we are able to continue for another year without raising the membership fee.

Open Lectures 2025-2026

During the year audiences enjoyed five open lectures mostly delivered at Holy Trinity Church Haddington with refreshments served on completion. These were: -

4th June 2025 :- **“Pioneering Scotswomen in Engineering from Ancient Universities to Hall of Fame”** by Dr Nina Baker OBE, Historian.

Over a century since women could become engineers, a story of pioneers and the important contribution women made to engineering in UK.

17th September 2025:- **“An archive tour around East Lothian”** by Jackie Sangster, Learning Manager Historic & Environment Scotland. An afternoon looking at archives & old photographs; starting in Dunbar taking a "bus tour" along the coast and thereafter meandering to Haddington.

10th November 2025:- **“Essential Agony: The Battle of Dunbar 1650”** by Dr Arran Paul Johnston Historian, Scottish Battlefields Trust. From the high politics to the individual experiences, the story of the campaign brought to life, setting its significance within the context of both the 17th century and our own times.

18th February 2026: - **“Scams and what to look out for”** by PC Dianne Bath, East Lothian Community Police Officer. How to avoid losing your pension!

15th April 2026: - **“Climate in Crisis: Mindsets & Narratives”** by Martin Baker, Climate Scientist and retired Head of Science Loretto School. A sobering account of climate change from an expert including atmospheric science research.

Communications:-

Promotion

Posters and social media promotion has taken place to advertise the lecture series and the general benefits of membership. A talk was given to Our Community Kitchen in Haddington and the organisation has been promoted through VCEL, Ageing Well and East Lothian Council.

Newsletter

David Taylor has taken over the editing and collation of the Newsletter, with assistance from the remaining working group, and produced a 2026 Spring Edition. Congratulations to David on restarting this useful information network, which has been sent to all members

The newsletter includes a report from the Chairperson and other committee members; Group Leaders are encouraged to submit reports on activities of individual groups. Notices of items of interest such as Open Lectures and forthcoming events are detailed.

All members are encouraged to send in items for inclusion about their u3a activities. In addition to those from group leaders.

Website

Maintenance of the website for the group continues by Ed Dee. Anyone can now access full details of the groups; this includes the East Lothian u3a email addresses of groups, information previously only open to members.

A new video describing the benefits of the u3a has been added to the website and a second cartoon version is available which will be personalized to East Lothian u3a.

Beacon

Further training has been provided by Ed Dee and individual training is available for group leaders should they want it.

The Beacon Member's portal that allows members to amend their details and view group meeting schedules was announced in the Spring Newsletter.

Treasurer Report

Treasurer Accounts submitted to the auditor are shown as a separate document

Despite a year-on-year recorded loss of £2657 (£791 in 2024-25) The situation is not discouraging. The 2025-26 figures include TAT membership for 2026-27 (which in previous years has pushed back into the following year's accounts). Additionally, some expected income did not materialise this year.

Direct comparison of room booking costs across years is problematic as anecdotally the degree of long-term advanced room booking across years has been reduced. Positively, some groups have shown an initiative in reducing their accommodation cost.

However, this April has seen an increase in room rental costs, clarification from U3A on Gift Aid, uncertainty over discretionary funding from ELC and proposals to increase some local U3A activities will put some pressure on finances next year and to that end, as mentioned previously the committee has initiated a vote on methods to ensure financial viability in the long-term future.

Conclusion

With 80% of our recent survey of group leaders who responded, saying they have fun and find the role interesting, East Lothian u3a continues to be an active organisation, with plans to grow our membership and groups. A Future Focus Strategy is in development, to equip us for sustainability and to further the national u3a mantra of Learn, Laugh, Live.

The committee commends this report to you, our members.

Carol Skye
Chairperson

Angela Callery
Secretary

Ed Dee
Treasurer