



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From **01.01.22** Period start date To **31.12.22** Period end date

Charity name: **The Sudbury Group of the Third Age Trust (Sudbury u3a)**

Charity registration number: **1101615**

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<b>The objects of Sudbury u3a are the advancement of education, 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.</b>
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	<b>Sudbury u3a provide speakers who talk on a wide range of subjects. There are a wide range of interest groups whereby members share knowledge and experience on a variety of subjects including Ambling, Art Appreciation, Architecture, Bird Watching, Book Binding, Bridge, Canasta, Circle Dancing, Cribbage, Current Affairs, Cycling, Dutch, Film, French, Garden Visits, German, Holidays &amp; Field Trips, Italian, Latin, Mahjong, Music Appreciation, Music Making, Painting &amp; Drawing, Petanque, Photography, Philosophy, Pitch &amp; Putt, Pub Lunches, Reading, Quiz, Real Ale, Science &amp; Technology, Scrabble, Snooker, Spanish, Rock &amp; Roll, Strolling, Table Tennis, Ten Pin Bowling, Trace Your Ancestors, Walking, Whist, Wine Appreciation, Wood Carving, Writing.</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>Trustees of Sudbury u3a provide educational and wellbeing improvement activities for those retired and semi-retired from full time employment in accordance to the guidance issued by the Charity Commission.</b>

## Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
	Para 1.38	<b>The only grants made are to our own interest groups, usually to help with</b>

Policy on grant making		<b>group start-up costs that are limited to £50.</b>
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	
Other		

## Achievements and Performance

	SORP reference	
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	<p><b>Following the detrimental effect of Covid over the past couple of years the charity has almost fully recovered its pre-covid position.</b></p> <p><b>Almost all of our interest groups have restarted and some new groups are getting underway.</b></p> <p><b>Membership is at 96% of where it was before 2020 and we continue our efforts to attract new members.</b></p>

### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	

Investment performance against objectives	Para 1.41	
Other		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<b>There was an operating gain for the year of £1,746</b>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<b>The policy of Sudbury u3a is that reserves should equal approximately the annual expenses.</b>
Amount of reserves held	Para 1.22	<b>£18,234</b>
Reasons for holding zero reserves	Para 1.22	<b>n/a</b>
Details of fund materially in deficit	Para 1.24	<b>n/a</b>
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<b>n/a</b>

### 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	<b>The principal source of income is the annual membership fee paid by members to cover the day-to-day operating costs of Sudbury u3a. Where appropriate gift aid is claimed from members contributions. The funds are held in Main and Deposit accounts. All these funds are consolidated in our annual accounts. Interest groups are self-financing with the exception of small start-up grants. The Holding account is used to hold the funds of Interest Groups. These funds are ring fenced and may only be used by the group that collected the funds. The Treasurer is responsible for overseeing all Interest Group funds in the Holding account.</b>
Investment policy and objectives including any social investment policy adopted	Para 1.46	<b>Sudbury u3a have no investments.</b>
A description of the principal risks facing the charity	Para 1.46	
Other		



## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	<b>Governed by the constitution of the Sudbury Group of the Third Age Trust (Sudbury u3a), a member of the Third Age Trust as an unincorporated Association, formally adopted 30<sup>th</sup> April 2003, amended 19<sup>th</sup> April 2006, 20<sup>th</sup> February 2013, 27<sup>th</sup> February 2018 and 22<sup>nd</sup> February 2022.</b>
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	<b>Unincorporated Association.</b>
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	<b>Trustees are nominated and elected/re-elected by the membership at the Annual General Meeting.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

## Reference and Administrative details

Charity name	The Sudbury Group of the Third Age Trust
Other name the charity uses	Sudbury u3a
Registered charity number	1101615
Charity's principal address	1, Reynolds Way Sudbury, Suffolk CO10 1PS

## 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	Brian Alfred Orton	Chair		Membership of Sudbury u3a
2	Anthony Sidney Lee	Vice Chair & Treasurer		Membership of Sudbury u3a
3	Dorothy Beal	Secretary		Membership of Sudbury u3a
4	John Derek Freeborn OBE	Membership Secretary		Membership of Sudbury u3a
5	Brian Eric Hemmings			Membership of Sudbury u3a
6	Nicola Goodwin			Membership of Sudbury u3a
7	Deanna Joan Hoile			Membership of Sudbury u3a
8	Jennie Leach			Membership of Sudbury u3a
9	Richard Owen Thomas			Membership of Sudbury u3a
10	Susan Melinda Campbell		1 <sup>st</sup> January to 13 <sup>th</sup> December	Membership of Sudbury u3a
11	Colette Bentley			Membership of Sudbury u3a
12	Richard Bruce Clegg			Membership of Sudbury u3a
13	Janet Elizabeth Cruttenden			Membership of Sudbury u3a
14	Ian George Mathews		13 <sup>th</sup> to 31 <sup>st</sup> December	Membership of Sudbury u3a
15				
16				
17				
18				
19				
20				

## Corporate trustees – names of the directors at the date the report was approved

Director name		
n/a		

## Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
n/a		

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	n/a
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	n/a
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	n/a

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

#### Name of chief executive or names of senior staff members (Optional information)

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### Exemptions from disclosure

Reason for non-disclosure of key personnel details

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### Other optional information

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## 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)	Brian Alfred Orton	Anthony Sidney Lee
Position (eg Secretary, Chair, etc)	Chair	Treasurer

Date

14/02/2023
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## Sudbury u3a Main Account 31 Dec 22

Actual  
12 months to  
31 Dec 21

4,330.00
9.00
223.00
1.38
1,149.20
5,712.58

### Receipts

Subscriptions  
Visitors  
Donations  
Interest on Deposit account  
Gift Aid

Actual  
12 months to  
31 Dec 22

10,052.00
0.00
1,505.00
7.57
793.71
12,358.28

### Payments

Capitation  
CLA Licence  
Direct Mail - Third Age Matters  
S&D Network

2,397.50
60.00
349.68
0.00
2,807.18

3,264.00
60.00
834.60
25.00
4,183.60

170.00
92.91
695.00
957.91

Monthly Meeting Room Hire  
Monthly Meeting Refreshments  
Monthly Meeting Speakers

835.00
128.88
1,225.00
2,188.88

97.50
100.73
416.90
264.00
0.00
136.65
2,101.64
131.72
69.14
0.00
0.00
0.00
246.65
19.99
211.90
25.00
3,821.82

Committee room hire  
On-line Meeting Costs  
Membership Stationery  
Membership Postage  
General Postage  
Printing/Stationery  
Su3an Printing & Distribution  
Grants to Groups  
Miscellaneous  
Group Leaders Seminar  
U3A National AGM/Workshops  
Beacon  
Events  
Equipment  
Coffee mornings  
New Members Meeting

187.50
0.00
523.48
483.00
0.00
209.14
1,268.42
88.89
144.37
339.80
132.51
26.99
13.92
242.51
461.26
118.26
4,240.05

7,586.91
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Total Payments

10,612.53
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-1,874.33
18,362.14
16,487.81

Total Receipts less Payments

1,745.75
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Brought forward from 31 Dec 21

16,487.81
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Surplus 31 Dec 22

18,233.56
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13,736.17
2,751.64
16,487.81

Deposit account balance

15,243.74
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Main account balance

2,989.82
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Bank balance 31 Dec 22

18,233.56
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Signed on behalf of Sudbury U3A Trustees 14 Feb 2023

Brian Orton  
Chair



  
Anthony Lee  
Treasurer



# Sudbury

learn,  
laugh,  
live

# u3a

## Sudbury u3a Holding Account Balance: 31-Dec-22

	Architecture	Art Visits	Bridge	Film	Garden Visits	Painting & Drawing	Real Ale	Science & Technology	Spanish	Table Tennis	Theatre	Travel 1	Travel 2	Woodcarving	Balance
	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£
<b>Receipts:</b>															
Contributions from group members	2,146.64	1,272.00		387.00	624.00	1,761.00			298.00	2,205.34	3,038.00	204.00	6,539.87	1,324.00	19,799.85
Total	2,146.64	1,272.00	0.00	387.00	624.00	1,761.00	0.00	0.00	298.00	2,205.34	3,038.00	204.00	6,539.87	1,324.00	19,799.85
<b>Payments:</b>															
Meeting Room Hire	150.00			225.00	30.00	1,740.00			286.00	2,304.00	2,974.00	204.00	6,347.48	750.00	5,485.00
Cost of Tours	1,658.02	1,130.00			515.00		25.00								12,853.50
Film costs				12.69											12.69
Purchase of Tools (2nd hand)				18.00											50.00
Refreshments for members															18.00
Meeting Expenses					20.28										20.28
Total	1,808.02	1,130.00	0.00	255.69	565.28	1,740.00	25.00	0.00	286.00	2,304.00	2,974.00	204.00	6,347.48	800.00	18,499.47
<b>Balance</b>															
Brought Forward at 1st January 2022	397.77	-24.00	391.43	195.89	17.49	93.27	0.00	85.04	0.00	599.66	687.64	369.37	254.69	163.75	3,232.00
Carried Forward at 31st December 2022	736.39	118.00	391.43	327.20	76.21	114.27	-25.00	85.04	12.00	501.00	751.64	369.37	447.08	687.75	4,592.38

Signed on behalf of Sudbury U3A Trustees 14 Feb 2023

Brian Orton  
Chair

Anthony Lee  
Treasurer

# **Independent examiner's report to the trustees of The Sudbury Group of The Third Age Trust (Sudbury u3a)**

I report to the trustees on my examination of the accounts of **The Sudbury Group of The Third Age Trust (Sudbury u3a)** for the year ended 31 December 2022.

## **Responsibilities and basis of report**

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

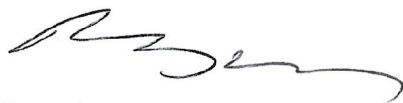
## **Independent examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Roderick Stewart Gray FCA Retired



Pasadena  
Cross Street  
Sudbury  
CO10 2DL

14/02/2023