

# YATE & SODBURY DISTRICT UNIVERSITY OF THE THIRD AGE

England & Wales · Charity number 1150627

## Details

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**Other names** YATE & SODBURY DISTRICT U3A

**Status** Registered

**Legal form** Other

**Registered** 2013-01-30

**Register** [View on the Charity Commission register](#)

## Contact

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**Address** 44  
Chapel Lane. Old Sodbury.  
Old Sodbury  
Bristol

**Phone** 07743 653753

**Email** [jkhw1962@gmail.com](mailto:jkhw1962@gmail.com)

**Website** <https://yate-sodbury.u3asite.uk>

## Activities

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**Objects:** 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.

**Activities:** Yate and Sodbury district U3A is an organisation which provides life-enhancing and life-changing opportunities. Retired and semi-retired come together and learn together not for qualifications but for its own reward: the sheer delight of discovery. Members share their skills and experiences, the learners teach and teachers learn and there is no distinction between them.

## Classification

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- **How:** Provides Services
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives, Arts/culture/heritage/science, Amateur Sport, Recreation
- **Who:** Elderly/old People

## Geography

- South Gloucestershire

## Finances

| Period end | Income  | Expenditure | Assets | Employees |
|------------|---------|-------------|--------|-----------|
| 2025-03-31 | £23,032 | £15,735     | -      | -         |
| 2024-03-31 | £13,913 | £14,173     | -      | -         |
| 2023-03-31 | £14,972 | £14,564     | -      | -         |
| 2022-03-31 | £14,417 | £10,158     | -      | -         |
| 2021-03-31 | £28,061 | £27,282     | -      | -         |

## Trustees

| Name                            | Role | Appointed  |
|---------------------------------|------|------------|
| Catherine Elizabeth Joyce Riley |      | 2025-04-17 |
| Craig Hodges                    |      | 2026-05-06 |
| Ian Merriman                    |      | 2026-05-06 |
| Janet Smith                     |      | 2026-05-06 |
| John Kevin Horatio Wilkinson    |      | 2024-04-19 |
| Julie Spooner                   |      | 2025-04-17 |
| Lesley Holman                   |      | 2025-04-17 |
| Paula Alison Young              |      | 2024-04-19 |
| Rodney Peter Dewey              |      | 2025-04-17 |
| Vasu Patel                      |      | 2026-04-16 |

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# Accounts

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**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## **Trustees' Annual Report for the period**

**From** 1 April 2020 **To** 31 March 2021

### **Reference and Administrative details**

**Charity name:** Yate & Sodbury District University of the Third Age (U3A)

**Charity registration number:** 1150627

**Charity's principal address:** 23 Carmarthen Close  
Yate  
Bristol  
BS37 7RR

### **Structure, Governance and Management**

#### **Description of charity's trusts:**

|                                 |                                                                                                                                                                                                                 |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type of governing document      | Constitution adopted 27 <sup>th</sup> September 2007, amended 16 <sup>th</sup> April 2014, amended 19 <sup>th</sup> April 2018                                                                                  |
| How is the charity constituted? | Unincorporated association                                                                                                                                                                                      |
| Trustee selection method        | New Trustees are either proposed and seconded by members and formally elected at an AGM held in April and serving a three-year term or formally co-opted by agreement of existing Trustees for a one-year term. |

#### **Additional information (optional)**

|                                                                                           |                                                                                                                                                                         |
|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Procedures for the induction and training of trustees                                     | Incoming trustees now attend a Trustee Induction Course run by the Third Age Trust.                                                                                     |
| The charity's organisational structure and any wider network with which the charity works | The charity is affiliated to the Third Age Trust, the umbrella body for Universities of the Third Age. It is also a member of the South West Region Association of U3As |

**Names of the charity trustees who managed the charity April 2020 - March 2021**

|    | <b>Trustee name</b> | <b>Office (if any)</b> | <b>Dates acted if not for whole year</b> | <b>Name of person (or body) entitled to appoint trustee (if any)</b> |
|----|---------------------|------------------------|------------------------------------------|----------------------------------------------------------------------|
| 1  | Janet Stuart        | Chair                  |                                          |                                                                      |
| 2  | Patrick Mills       | Vice Chair             |                                          |                                                                      |
| 3  | Marilyn Heffer      | Treasurer              |                                          |                                                                      |
| 4  | Lute van der Park   | Secretary              |                                          |                                                                      |
| 5  | Pauline Clark       | Trustee                |                                          |                                                                      |
| 6  | Jean Crispin        | Trustee                |                                          |                                                                      |
| 7  | Chris Brown         | Trustee                |                                          |                                                                      |
| 8  | Elaine Stone        | Trustee                |                                          |                                                                      |
| 9  | Moirra Jenkins      | Trustee                |                                          |                                                                      |
| 10 | Annie Browning      | Trustee                |                                          |                                                                      |

**Names of the charity trustees who manage the charity from April 2021**

|   | <b>Trustee name</b> | <b>Office (if any)</b> | <b>Dates acted if not for whole year</b> | <b>Name of person (or body) entitled to appoint trustee (if any)</b> |
|---|---------------------|------------------------|------------------------------------------|----------------------------------------------------------------------|
| 1 | Janet Stuart        | Chair                  |                                          |                                                                      |
| 2 | Patrick Mills       | Vice Chair             |                                          |                                                                      |
| 3 | Marilyn Heffer      | Treasurer              |                                          |                                                                      |
| 4 | Lute van der Park   | Secretary              |                                          |                                                                      |
| 5 | Pauline Clark       | Trustee                |                                          |                                                                      |
| 6 | Jean Crispin        | Trustee                |                                          |                                                                      |
| 7 | Binny Fraser        | Trustee                |                                          |                                                                      |
| 8 | Barry Miller        | Trustee                |                                          |                                                                      |

## **Objectives and Activities**

|                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                   |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Summary of the purposes of the charity as set out in its governing document                                                                                          | 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 all associated activities conducive to learning and personal development in the Yate and Chipping Sodbury district.                                                                           |
| 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. | Creation of Interest Groups for our members to facilitate learning via a wide of range of activities. These will be at a much lesser cost than equivalent educational bodies.<br>Membership of Yate & Sodbury District U3A is open to individuals who are interested in furthering the work of the U3A and who have paid the annual subscription. |
| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit                                         | Yate & Sodbury District U3A confirms that it continues to carry out its activities for the public benefit and that, in doing so, the trustees have had regard to the <a href="#">Charity Commission's public benefit guidance</a> where relevant.                                                                                                 |

## **Achievements and Performance**

|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Summary of the main achievements of the charity. | <p>This year from April 2020 to March 2021 it was difficult to conduct our full range of normal meetings and activities due to Covid19 lockdowns and restrictions. However, where possible groups were able to carry on by meeting online or outside in small groups and even in between lockdowns indoors under covid safe protocols.</p> <p>Yate &amp; Sodbury District U3A has maintained an Executive Committee of Trustees, new Trustees were appointed in April 2020. During the year the Committee organised online speaker meetings for the benefit of all members and continued to publish quarterly newsletters.</p> <p>As of April 2021, we had 1,220 members and 80 groups covering a wide range of interests.</p> |
|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

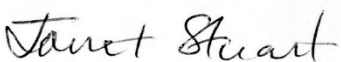
## **Financial Review**

|                                                                                  |                                                                                                                                                                                   |
|----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Review of the charity's financial position at the end of the period              | Bank account balance as of 31 March 2021 was £6,829.36                                                                                                                            |
| The policy for holding reserves                                                  | Yate & Sodbury U3A aims to maintain a level of reserves of about six months expenditure. This is in line with Charity Commission guidance                                         |
| Reasons for holding zero reserves                                                | N/A                                                                                                                                                                               |
| Details of fund materially in deficit                                            | None                                                                                                                                                                              |
| Explanation of any uncertainties about the charity continuing as a going concern | The membership is growing again after the pandemic and the members of the Committee are confident there is viability of Yate & Sodbury District U3A continuing as a going concern |

## **Declarations**

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

**Signed on behalf of the charity's trustees**

**Signature:** 

**Full name:** Janet Elizabeth Stuart

**Position:** Chair

**Date:** 15 November 2021

**Yate & Sodbury District U3A Statement of Accounts: all accounts Year to 31<sup>st</sup> March 2021**

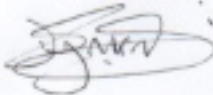
| <i>Category</i>                          | <b>Income</b>         |  | <b>Expenditure</b> |
|------------------------------------------|-----------------------|--|--------------------|
| Membership                               | £<br>10,536.00        |  |                    |
| Gift Aid                                 | £ 1,770.00            |  |                    |
| Donations                                | £ 179.19              |  |                    |
| Miscellaneous                            | £ 8.00                |  | £ 20.78            |
| Social Group Activities                  | £<br>15,568.46        |  | £<br>15,568.46     |
| Postage                                  |                       |  | £ 681.73           |
| Beacon Subscription                      |                       |  | £ 1,516.00         |
| Capitation Fee                           |                       |  | £ 5,306.00         |
| Communications                           |                       |  | £ 3,606.34         |
| Equipment                                |                       |  | -                  |
| Committee Expenses                       |                       |  | £ 6.19             |
| General Activities                       |                       |  | £ 60.00            |
| PayPal commission                        |                       |  | £ 113.73           |
| Speaker Fees                             |                       |  | £ 350.00           |
| Group Activities                         |                       |  | -                  |
| Printing                                 |                       |  | £ 53.50            |
|                                          |                       |  |                    |
| <b>Sub-totals</b>                        | <b>£28,061.65</b>     |  | <b>£27,282.73</b>  |
| Gain /Loss on Year                       | £778.92               |  |                    |
| Brought forward                          | £ 6,050.44            |  |                    |
|                                          |                       |  |                    |
| <b>Total</b>                             | <b>£<br/>6,829.36</b> |  |                    |
|                                          |                       |  |                    |
| <b>Balance Sheet at 31/03/2021</b>       |                       |  |                    |
| Current Account                          | £ 6,829.36            |  |                    |
| PayPal Account                           | £ 0.00                |  |                    |
|                                          |                       |  |                    |
| <b>Total to carry Forward to 2021/22</b> | <b>£<br/>6,829.36</b> |  |                    |
|                                          |                       |  |                    |

### **Report to the Trustees of the Yate & Sodbury District U3A**

My report covers the Accounts of the Yate & Sodbury U3A for the year ended 31 March 2021.

I have examined the Accounts for 2020-21, including a scrutiny of invoices, bank statements and cheque books. I have also reviewed the Group Annual Accounts for the year ended 31 March 2021 and the associated Beacon records.

The transactions for the year, and balances as at 31 March, appear to have been kept in order, and represent the financial activities and standing of Yate & Sodbury U3A for the year ended 31 March 2021.



David Symons

11-04-2021

19 Wickham Close

Chipping Sodbury

Bristol BS37 6NH