



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 th September 2007, amended 16 th April 2014, amended 19 th 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

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
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	Maira Jenkins	Trustee		
10	Annie Browning	Trustee		

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

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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. 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 Charity Commission's public benefit guidance where relevant.

Achievements and Performance

Summary of the main achievements of the charity.	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. Yate & 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. As of April 2021, we had 1,220 members and 80 groups covering a wide range of interests.
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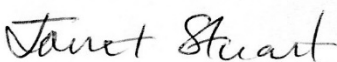
Financial Review

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 31st March 2021

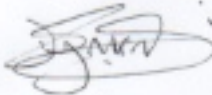
<i>Category</i>	Income		Expenditure
Membership	£ 10,536.00		
Gift Aid	£ 1,770.00		
Donations	£ 179.19		
Miscellaneous	£ 8.00		£ 20.78
Social Group Activities	£ 15,568.46		£ 15,568.46
Postage			£ 681.73
Beacon Subscription			£ 1,516.00
Capitation Fee			£ 5,306.00
Communications			£ 3,606.34
Equipment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

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