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Charity Commission Annual Return 2025

THETFORD U3A

Charity registration number: 1161699

Most of the information you give in this form will become publicly available on the Register of Charities. Any field that the Charity Commission will not display will be clearly marked.

This document is a record of the information provided in the Annual Return 2025.

PART A - Charity information

Financial period

Financial period start date

01/04/2024

Financial period end date

31/03/2025

Income and spending

Income £

£ 28,404

Spending £

£ 25,393

Number of contracts from government

How many contracts (other than grant agreements) did your charity receive from central government or a local authority during the financial period for this return?

0

Number of grants from government

How many grants did your charity receive from central government or a local authority during the financial period for this return?

0

Income breakdown

Donations and legacies (excluding Endowments Received)

£ 28,404

Charitable activities

£ 0

Other trading activities

£ 0

Investments

£ 0

Other

£ 0

Grantmaking**Is grant making the main way your charity carries out its purposes?**

No

Recipients of grants**Please round all figures to the nearest pound (do not enter decimal points or commas).****Individuals**

£ 1,910

Other charities

£ 3,274

Other organisations that are not charities

£ 1,913

Grant recipients related parties**Are any of the grant recipients related parties to the charity?**

No

Trustee payments**Excluding out of pocket expenses, for what were any of the trustees paid during the financial period for this return?**☒ e. None of the trustees have been paid**Did any of the trustees resign and take up employment with your charity in the financial period of this return?**

No

Income from outside the UK**Did your charity receive income from outside of the United Kingdom in the financial period of this return?**

No

Delivering activities outside the United Kingdom**Did your charity deliver charitable activities outside of the United Kingdom in the financial period of this return?**

No

Spending outside of the United Kingdom**Did your charity spend funds outside of the United Kingdom in the financial period of this return?**

Total Spending outside of the United Kingdom

Trading subsidiaries

Does the charity have any trading subsidiaries?

Property

Were any of your charity's properties held by holding or custodian trustees on behalf of your charity (excluding the Official Custodian) during the financial period for this return?

Employment contract types

People were permanently employed by your charity**People were on fixed-terms contracts with your charity****Self-employed people were working for your charity**

Governance policies

Internal charity financial controls policy and procedures**Safeguarding policy and procedures****Financial reserves policy and procedures****Complaints policy and procedures****Serious incident reporting policy and procedures****Internal risk management policy and procedures****Trustee expenses policy and procedures****Trustee conflicts of interest policy and procedures****Investing charity funds policy and procedures****Campaigns and political activity policy and procedures**

Bullying and harassment policy and procedures**Social media policy and procedures****Engaging external speakers at charity events policy and procedures**

Safeguarding

Has your charity provided services to children and/or adults at risk in the financial period of the return?

Serious Incidents

Has your charity reported all Serious Incidents (including any historical incidents) that the charity became aware of during the financial period of this return?

External risk and impact

Donations**Other income - grants****Other income - contracts****Other income - investment****Expenditure on charitable activities****Expenditure on overheads****Number of volunteers****Number of employees****Number of trustees****Fundraising activities****Capacity to deliver services****Total service demand**

Volunteers

Excluding trustees, provide an estimate of the number of volunteers who carried out charitable activities on behalf of your charity in the United Kingdom during the financial period of this return?

44

Privacy statement

Any information you give us will be held securely and processed only in accordance with the rule on data protection. We will not disclose your personal details to anyone unconnected to the Charity Commission unless:

- you have consented to their release; or
- we are legally obliged to disclose them; or
- we regard disclosure as either (a) necessary so that we can properly carry out our statutory functions or (b) necessary in the public interest.

We may share and disclose information about you with relevant public authorities, regulatory bodies and agencies, outside the Charity Commission but only if:

- we can lawfully do so; and
- we decide that disclosure is necessary for national security, crime detection, prevention, and law enforcement, or other issues in the public interest

Information we collect about you

We will use this information:

To enable us to carry out our statutory functions and duties;

This will include the following actions:

- (a) update, consolidate, and improve the accuracy of our records;
- (b) undertake crime detection and prevention and law enforcement and assist the third parties specified above to investigate or prevent crime and carry out law enforcement;
- (c) data analysis, testing, research, statistical and survey purposes

Information we receive from other sources.

Information we receive from other sources

We may combine this information with information you give to us and information we collect about you.

We may use this information and the combined information for the purposes set out above (depending on the types of information we receive).

We will ensure that any such disclosure and use is proportionate; considers your right to respect for your private life; and is done fairly and lawfully in accordance with the data protection principles of the Data Protection Act.

The Data Protection Act 1998 regulates the use of 'personal data', which is essentially any information, however stored, about identifiable living individuals.

As a 'data controller' under the Act, the Charity Commission must comply with it. Any changes we may make to our privacy statement in the future will be set out in the replacement version of this form.

Please check back frequently to see any updates or changes to our privacy policy.

Declaration

This annual return has not been submitted and no Declaration has been made



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1 April 2024

Period start date To 31 March 2025

Period end date

Charity name: Thetford U3A

Charity registration number: 1161699

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The charity's object ('the object') is the advancement of education, and in particular the education of older people and those retired from full time work, by all means including associated activities conducive to learning and personal development in Thetford and the surrounding area.
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	44 different Groups providing educational and hobby subjects to the elderly
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees follow all guidance issued by the Charity

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	Grants presented by groups are considered by the trustees at monthly meeting, discussed and either approved or rejected.
Policy on social investment including program related investment	Para 1.38	N/A
Contribution made by volunteers	Para 1.38	Volunteers give both their time and skills to run each of the groups

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	The Charity continues to attract retired and aged people to participate in educational, skills and social groups, which encourage old and lonely people to meet and enjoy each other company

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	N/A
Performance of fundraising activities against objectives set	Para 1.41	N/A
Investment performance against objectives	Para 1.41	N/A
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The charity is in a sound financial position	
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Only a small amount is set by the trustees, this would ensure that any sudden drop in volunteers and members The groups set up would still be able to provide the present level of service.	
Amount of reserves held	Para 1.22	£3000	
Reasons for holding zero reserves	Para 1.22	N/A	
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	None	

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	Gifts from participants and donations
Investment policy and objectives including any social investment policy adopted	Para 1.46	N/A
A description of the principal risks facing the charity	Para 1.46	The only possible risk is that no one volunteers to become a Trustee and thereby not managing the charity
Other		

Structure, Governance and Management

Description of charity's trusts:		Constitution
Type of governing document (trust deed, royal charter)	Para 1.25	Unincorporated members association
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Trustees are volunteers who are then proposed before the AGM and voted on to the committee.
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	Trustees are nominated by members and voted on at the AGM

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	The charity is governed centrally by central U3A
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	Thetford University of the Third Age
Other name the charity uses	Thetford U3A
Registered charity number	1161699
Charity's principal address	9 George Road Thetford Norfolk IP24 2UD

Funds held as custodian trustees on behalf of others

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

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)

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

--

Other optional information

--

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)	<i>Lorraine Thompson</i>	
Full name(s)	Lorraine Thompson	
Position (eg Secretary, Chair, etc)	Secretary	
Date	September 2025	

THETFORD U3A
INCOME AND EXPENDITURE ACCOUNT SUMMARY FOR THE YEAR ENDED 31/03/2024

	31/03/2025		31/03/2024	
	INC	EXP	INC	EXP
General Purposes Fund	10,585.84	8,762.34	11,017.28	7,922.51
Days Out Group	8,790.10	7,784.37	7,811.62	8,159.62
Other Groups	9,028.34	8,847.11	7,164.83	6,959.73
	28,404.28	25,393.82	25,993.73	23,041.86
Surplus (deficit)		3,010.46		2,951.87
Brought Forward		12,215.89		9,264.02
BALANCE		15,226.35		12,215.89
Funds as at 31/03/2024				
Bank Accounts:				
Main Bank Account		12,144.69		10,311.07
No 2 Bank Account		1,625.89		620.16
Cash in hand:				
Group funds		1,434.77		1,253.54
Membership float		21.00		21.00
Cash in hand		0.00		10.12
TOTAL FUNDS		15,226.35		12,215.89

INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31/03/2025

	2024/2025	2023/2024
INCOME:		
Members Subscriptions	9,907.89	9,287.98
Advertising Refund	0.00	25.00
Group Hall Hire	210.00	219.00
Gift Aid	0.00	1,022.30
Quiz	0.00	221.50
Donations	94.00	69.00
Grants	0.00	150.00
Bank	10.12	0.00
Transfer	373.95	0.00
Rerfreshments	0.00	22.50
	<u>10,595.96</u>	<u>11,017.28</u>
EXPENDITURE		
Refund Membership	40.00	10.00
Postage	178.69	387.25
Venue Hire	89.50	1,177.00
Group Venue Hire	399.00	154.00
Trustees Expenses	0.00	0.75
Stationery	275.30	207.01
Printer/Software/Beacon	504.36	451.43
Group Grants	893.94	55.42
Advertising and Printing	1,050.34	1,123.73
Third Age Trust Fees	1,792.00	1,508.00
Third Age Trust Magazine	1,482.73	974.49
Monthly Speakers Expenses	1,145.26	1,095.00
Social Wefare	142.65	107.47
Royal British Legion	0.00	27.50
Xmas Party	392.99	266.42
Quiz	242.00	0.00
Refreshments	108.58	247.54
Auditor	25.00	79.50
10th Anniversary Meet	0.00	50.00
	<u>8,762.34</u>	<u>7,922.51</u>
Excess of Income over Expenditure	1,833.62	3,094.77
Surplus (deficit)/Ordinary Activities		3,094.77

	2024/2025	2023/2024	
GROUPS			
Days Out Group:	8790.10	7,811.62	
	7784.37	8,159.62	
	1005.73		
Groups Other:	9065.34	7,164.83	#REF!
	8884.11	6,959.62	
	181.23	205.21	
Balance B/Fwd as at 31.03.24			
	12215.89	9264.02	
	<u>15,236.47</u>	<u>12,215.89</u>	
FUNDS AS AT 31/03/24			
Bank Accounts:			
Main Bank Account	12,144.69	10,311.07	
No 2 Bank Account	1,625.89	620.16	
Cash in hand:			
Group funds	1,434.77	1,253.54	
Membership float	21.00	21.00	
Cash in hand	0.00	10.12	
	<u>15,226.35</u>	<u>12,215.89</u>	

I certify that this is a true and accurate statement of the financial position of Thetford U3A

William Robertson

William Robertson
Treasurer

Date

30 APRIL 2025

Lesley Braund

Lesley Braund
Chair
Thetford U3A

Date

1. 5 2025

LH Thompson

Lorraine Thompson
Secretary
Thetford U3A

Date

1st May 2025

I have examined the financial records of the Thetford Branch of the U3A for the period ending 31/3/2024 and can confirm that they show a true and fair position of the groups accounts as of that date.

Colin Mackay

Colin Mackay
FCMA

Date

13/5/25