

# CHALFONTS U3A

England & Wales · Charity number 1168664

## Details

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**Status** Registered

**Legal form** Other

**Registered** 2016-08-08

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

## Contact

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**Address** Chalfont St. Peter Community Centre  
Gravel Hill  
Chalfont St. Peter  
Gerrards Cross  
Buckinghamshire  
SL9 9QX

**Phone** 01494873701

**Email** [secretary@chalfontsu3a.org.uk](mailto:secretary@chalfontsu3a.org.uk)

**Website** [ChalfontsU3A](#)

## Activities

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**Objects:** TO ADVANCE EDUCATION AND IN PARTICULAR THE EDUCATION OF PEOPLE NOT IN FULLTIME EMPLOYMENT WHO ARE IN THEIR THIRD AGE (BEING THE PERIOD OF TIME AFTER THE FIRST AGE OF CHILDHOOD DEPENDENCE AND THE SECOND AGE OF FULL TIME EMPLOYMENT AND/OR PARENTAL RESPONSIBILITY) RESIDING IN CHALFONT ST PETER AND CHALFONTS AND ITS SURROUNDING LOCALITY.

**Activities:** 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, in Chalfont ST Peter and its surroundings locally

## Classification

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- **How:** Acts As An Umbrella Or Resource Body
- **What:** Education/training

## Geography

- Buckinghamshire

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£68,934	£63,572	-	-
2024-03-31	£26,076	£22,213	-	-
2023-03-31	£22,096	£16,929	-	-
2022-03-31	£5,632	£17,441	-	-
2021-03-31	£20,144	£8,919	-	-

## Trustees

Name	Role	Appointed
Christine Mary Hillis		2022-07-20
David J Powell		2024-02-16
John Krushner		2023-07-12
Katherine Trotman		2025-07-09
Les Klein		2024-07-10
Lynda Cameron		2024-07-10
Maureen Green		2022-07-20
Paul Hirszowicz		2025-02-19
Robert Andrew Kiddy		2025-07-09
Susan Graham		2025-07-09
Val Smith		2024-07-10

**CHALFONTS U3A**

England & Wales - Charity number 1168664

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# Accounts

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# **Chalfonts u3a**

## **Report of the Trustees for the year ending 31st March 2025**

*The Trustees present their report along with financial statements of the Charity for the year end 31st March 2025. The financial statements comply with the Charity's Constitution. Chalfonts u3a is a Charity Registered with the Charity Commission under registration number 1168664*

### **Objective.**

The objective of Chalfonts u3a (Cu3a) is:

“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.”

This objective was adopted by Cu3a at its Annual General Meeting on 11th May 2016. It's wording follows the recommendation of the Third Age Trust, the national body for the u3a movement and complies with discussions held between the Trust and the Charity Commission.

### **Activities**

Chalfonts u3a advances its objective by:

- Holding monthly General Meetings, where members listen to speakers on a wide variety of subjects.
- Operating activity and interest groups focused on specific topics, eg: art, history, science, and technology.
- Organising visits to places of interest to the membership eg: historic houses, museums, gardens and theatre performances.

### **Achievements and Performance**

In March 2025 Chalfonts u3a was able to celebrate ten years in operation since it was officially constituted in 2015 as a member of the Third Age Trust. This level of support has been very encouraging from a thriving and enthusiastic membership and will be celebrated with a series of events in the summer.

Chalfonts u3a continued to thrive during 2024-2025. There are now 75 interest groups offering a wide range of subject areas and activities. These attracted new members and offered existing members a varied choice. New convenors have stepped forward to take on the co-ordination of interest groups from convenors who wished to stand down after serving a number of years. Many interest groups have a core of active members involved in running the group and the day trips and visits continued to be popular. Groups continued to book rooms at the Chalfonts Community Centre and Leisure Centre over the course of the financial year and have made use of local cafes for smaller group meetings.

The Committee continues to run monthly members meetings open to all members offering an option to attend via Zoom. Attendance at the monthly meetings in person varies between 80-120, depending on the topic, with 15-20 extra participants taking part via Zoom.

In June the Trustees set up a Planning for the Future Subgroup to examine organisational issues relating to data management, and to oversee the upgrading of the website content. As a result, the website underwent an overhaul and was relaunched in September 2024. This is the first port of call for new members and those looking to join the organisation. We are seeing on average 1,800 visitors each month to the website. The audio -visual system in partnership with the Chalfont St Peter Community Centre has been upgraded and Chalfonts u3a continues using the Beacon database for communication with its members.

During 2024/5 the Trustees have reviewed and updated Chalfonts u3a policies and procedures covering Accessibility, Membership, Data protection, Privacy, Finance policies and procedures, Advice for our Interest group convenors, Equality, Diversity and Inclusion, Complaints, Disciplinary matters, Health and Safety and Safeguarding.

## **Financial Review**

The current financial position of Cu3a is presented in the appended accounts.

The membership fee of £20.00 was retained for the 2025/26 year.

The subsidies policy adopted in 2022 has bedded down successfully, offering each interest group one free meeting per month at the Community Centre or Leisure Centre.

## **Reserves Policy**

The Trustees continue to follow the advice provided by the Third Age Trust in maintaining an operating expenditure level commensurate in dealing with unforeseen costs and/or to ensure an orderly dissolution of Cu3a should it ever prove necessary. The Trustees believe that the present reserves are adequate.

## **Membership**

Total membership of Chalfonts u3a for the year 2024/25 was 1140. This compares with 1052 for the year 2023/2024. It was pleasing to note a continued growth in the number of new members.

The regular New Members Coffee morning has proved very popular in welcoming and introducing new members to the organisation. This is organised by the Vice Chair with support from other Trustees and Cu3a members.

## **Future Plans**

The last nine years has seen Chalfonts u3a grow from its embryonic stage to become a very vibrant, energetic organisation of over 1100 members sharing similar values. New members bring fresh ideas and a vibrancy that is infectious. We continue with our policy of never wishing to close a group activity to new members and always seek to establish a new group from within an existing group activity.

## **Structure, Governance and Management**

The Trustees are appointed at an Annual General Meeting for a period of one year. The Trustees may seek re-election for a further one-year term. At the AGM in 2024 it was again agreed that Trustees and officers serve for a maximum of four consecutive years (instead of three as previously). We remain affiliated to the Third Age Trust, u3a National Organisations, and the u3a Thames Valley Network.

All Trustees are volunteers and receive no remuneration or other benefits in return for their services.

This is my first year serving as Chair of the Trustees. I would like to record a huge thank you to all my fellow Trustees for all the work they undertake to make our u3a a successful, inclusive, outward and forward-looking organisation. It has been an honour to serve such a wonderful local community-based organisation and to contribute to its continued success in some small way.

Chalfont u3a is managed for its members by a committee consisting of the following Trustee positions:

Chair	John Krushner
Vice-Chair	Val Smith
Secretary	Chris Hardwick
Treasurer	Chris White
Membership Secretary	Maureen Green
Group Coordinator	Lyn Cameron
Webmaster	Les Klein
Beacon Administrator	Paul Hirszowicz
Speaker Coordinator	Geoff Clegg
Newsletter Editor	David Powell
Finance Officer	Christine Hillis

Honorary Co-Presidents                      David Burbidge & Val Smith

## Interest Group Convenors

Each of the activity groups has a Convenor to organise their programmes, source, and book venues, arrange subject speakers etc. In turn, they are hugely supported by the Group Coordinator in particular and by the Committee in general.

## Approvals

This report has been approved by the Trustees and signed on their behalf.

Name:                      John Krushner

Position:                      Chair

Signed:



Date:                      June 2025

**Chalfonts USA Accounts for year ending 31 March 2025**

Receipts and Payments		31/03/2025	31/03/2024
<b>Receipts</b>			
Membership fees (1)	22655	20216	
Member contributions to activities (2)	40504	20383	
Gift Aid	3770	3201	
Riviera Travel (3)	1126	1412	
Third Age Trust Grant for Feast Day (4)	322	0	
Outings surplus (5)	0	2222	
Miscellaneous income other	557	912	
<b>Total receipts</b>	<b>68934</b>	<b>48346</b>	
<b>Payments</b>			
Hire charges Everyone Active (6)	14900	12877	
Hire Charges CSPCC member activities (7)	15437	14058	
Activity payments (tutors/refunds) (8)	16264	3810	
Membership refunds	100	120	
Central USA costs	8287	7212	
Outings Deficit (9)	894	0	
Hire Charges CSPCC CUSA (10)	1883	1543	
Newsletters / Printing / Postage	979	703	
Speaker fees/expenses	499	1265	
New subsidies (11)	647	0	
Expenses	595	1153	
10 year celebration deposits (12)	1358	0	
Contribution to CSPCC PA SYSTEM (13)	1000	0	
Miscellaneous expenditure	728	835	
<b>Total Payments</b>	<b>63572</b>	<b>43576</b>	
<b>Deficit/Surplus</b>	<b>5362</b>	<b>4770</b>	

**Balance Sheet**

31/03/2025      31/03/2024

<b>ASSETS</b>		
Cash at bank - Lloyds	29469	23214
Cash at bank - Nat West	20024	20918
HF Holidays investment	113	112
<b>TOTAL ASSETS</b>	<b>49606</b>	<b>44244</b>
<b>SURPLUS (14, 15)</b>		
Cash at bank brought forward/investment	44244	39474
Surplus for the year	5362	4770
<b>TOTAL SURPLUS</b>	<b>49606</b>	<b>44244</b>

I have examined the Receipts and Payments Account and Balance Sheet and in my opinion they are in accordance with the accounting records, vouchers, bank statements and information supplied to me by Chalfonts u3a.

Signed on behalf of the Committee

Chair, John Krushner



Treasurer, Chris White



*Helen Hall*

Financial Examiner, Helen Hall

25 June 2025

Notes to accompany 2024/25 accounts on payments and receipts basis

1. Membership subscriptions have been maintained at £20pp. Membership has increased to 1140 from 1052.
2. Members contribute to the cost of room hire / court hire / tutors for activities that take place at Chalfont St Peter Community Centre (CSPCC) and the Leisure Centre (Everyone Active). The cu3a subsidise these costs enabling each group to have one free booking per month.
3. Riviera Travel continues to be popular with members to the benefit of Cu3a.
4. We were fortunate to receive a grant from The Third Age Trust to support our presence at the Chalfont St Peter Feast Day.
5. Cu3a outings are run to cover their costs in a nil account with Nat West. There is often a surplus/loss showing as outings run across the year end.
6. Hire charges Everyone Active is for the leisure centre where members use courts to play table tennis, pickle ball, badminton etc
7. Hire charges CSPCC is for member activities such as Mah Jong, Bridge etc
8. Tutors are hired for Yoga, Pilates and Tai Chi etc
9. Outings deficit – see point five above
10. Hire charges CSPCC includes room hire for the monthly meetings, committee meetings and the affiliation fee that we pay to CSPCC
11. New subsidies were introduced in 2024 including free refreshments at the monthly meetings and gratuities for drivers and guides on Cu3a outings.
12. In 2025 we will be celebrating our 10<sup>th</sup> Anniversary – these payments were for deposits for some of the activity planned.
13. In 2024 we contributed £1000 to the CSPCC for the upgrading of the PA system – our members benefit from this especially at the monthly meetings.
14. The Trustees continue to follow the advice provided by the Third Age Trust in maintaining an operating expenditure level commensurate in dealing with unforeseen costs and/or to ensure an orderly dissolution of Cu3a should it ever prove necessary. The contingency is based upon the following:
  - a. Full year of Third Age Trust payments
  - b. Six months of payments for room / court hire with CSPCC and Everyone Active with no member receipts for related activities.
  - c. Full year of annual licences
  - d. Outings remain at net zero

The Trustees believe that the present reserves are adequate.

15. Outings account (NAT WEST) MAIN PRE PAYMENTS AND ADVANCE RECEIPTS are as follows:

**PREPAYMENTS - Theatre Group £16209.50: Excursions £11393.88**

**ADVANCE RECEIPTS - Theatre Group £21284.50: Excursions £15104: Garden Visits £7132: Other £70**

The pre payments comprise tickets and deposits that have been paid for in 2024/2025 where the outing does not happen until 2025/2026. The advance receipts comprise receipts from members for tickets/coaches/refreshments for outings that do not happen until 2025/2026 financial year. All outings are costed on a neutral basis.

**CHALFONTS U3A**

England & Wales - Charity number 1168664

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# Accounts

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# **Chalfonts u3a**

## **Report of the Trustees for the year ending 31st March 2024**

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### **Objective.**

The objective of Chalfonts u3a (cu3a) is:

“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.”

This objective was adopted by cu3a at its Annual General Meeting on 11th May 2016. It's wording follows the recommendation of the Third Age Trust, the national body for the u3a movement and complies with discussions held between the Trust and the Charity Commission.

### **Activities**

Chalfonts u3a advances its objective by:

- Holding monthly General Meetings, where members listen to speakers on a wide variety of subjects.
- Operating activity and interest groups focused on specific topics, e.g., art, history, science, and technology.
- Organising educational visits to places of interest to the membership, e.g., historic houses, museums, and gardens.

### **Achievements and Performance**

Chalfonts u3a continued to thrive during 2023-24, attracting new members and establishing four new interest groups over the course of the year. There are now 75 interest groups, running from the local Community and leisure centres, going on outings or meeting in members' homes. New convenors have stepped forward to take on the co-ordination of interest groups from convenors who wished to step down after serving a number of years. Many interest groups have a core of active

members involved in running the group. The ability to identify new convenors and involve group members in organising and managing the groups ensures the groups are sustainable and shares out the tasks of running each group. Our groups booked over 500 rooms at our local Community Centre and over 800 court bookings at the local Leisure Centre over the course of 2023/24.

Despite the pressure of the cost-of-living crisis our day trips and visits have continued to prove very popular with a wide range of members. We have booked and paid for 3699 tickets/places, 47 coaches and completed 83 outings/events.

In January 2024 a series of workshops was held for convenors focussing on issues to do with running groups, keeping groups interesting and attracting new convenors to come forward. The smaller group format was well received, and feedback was positive.

The Committee continues to run monthly members meetings open to all members offering an option to attend via Zoom. Attendance at the monthly meetings in person varies between 100-200, depending on the topic, with 15-20 extra participants taking part via Zoom. Since Autumn 2023 there had been an increase in the number of members coming to monthly meetings in person, whilst numbers on Zoom continue to decline.

In June the Trustees set up a Planning for the Future Subgroup to examine organisational issues relating to data management, and to oversee the upgrading of the website content. As a result, the website underwent a major overhaul and was relaunched in October 2023. This is the first port of call for new members and those looking to join the organisation. We are seeing on average 1,600 unique visitors each month to the website. Plans to upgrade the audio -visual system in partnership with the Chalfont St Peter Community Centre are on-going. The Trustees decided to continue using the Beacon database following an investigation of possible alternatives.

During 2023/24 the Trustees have reviewed and updated Chalfonts u3a policies and procedures covering Accessibility, Membership, Data protection, Privacy, Finance policies and procedures, Advice for our Interest group convenors, Equality, Diversity and Inclusion, Complaints, Disciplinary matters, Health and Safety and Safeguarding.

## **Financial Review**

The current financial position of cu3a is presented in the appended accounts.

The membership fee of £20.00 was retained for the 2023/24 year.

The subsidies policy adopted in 2022 has bedded down successfully, offering each interest group one free meeting per month at the Community centre or Leisure centre.

## **Reserves Policy**

The Trustees continue to follow the advice provided by the Third Age Trust in maintaining an operating expenditure level commensurate in dealing with unforeseen costs and/or to ensure an orderly dissolution of CU3A should it ever prove necessary. The Trustees believe that the present reserves are adequate.

## **Membership**

Total membership of Chalfonts u3a for the year 2023/2024 was 1051. This compares with 931 for the year 2022/2023. It was pleasing to note a continued growth in the number of new members.

A regular New Members Coffee morning has proved very popular in welcoming and introducing new members to the organisation. This is organised by the Vice Chair and Membership secretary with support from other Trustees.

## **Future Plans**

The last nine years has seen Chalfonts u3a grow from its embryonic stage to become a very vibrant, energetic organisation of over 1000 members sharing similar values. New members bring fresh ideas and a vibrancy that is infectious. We continue with our policy of never wishing to close a group activity to new members and always seek to establish a new group from within an existing group activity.

In Summer 2024 Chalfonts u3a will be participating in the local community Arts week culminating in the annual Feast of St Peter in late June.

## **Structure, Governance and Management**

The Trustees are appointed at an Annual General Meeting for a period of one year. The Trustees may seek re-election for a further one-year term. At the AGM in 2023 it was agreed that Trustees and officers serve for a maximum of four consecutive years (instead of three as previously). We remain affiliated to the Third Age Trust, u3a National Organisations, and the u3a Thames Valley Network.

All Trustees are volunteers and receive no remuneration or other benefits in return for their services.

This is my final year serving as Chair of the Trustees. I would like to record a huge thank you to all my fellow Trustees for all the work they undertake to make our u3a a successful, inclusive, outward and forward-looking organisation. It has been an honour to serve such a wonderful local community-based organisation and to contribute to its continued success in some small way.

Chalfont u3a is managed for its members by a committee consisting of the following Trustee positions:

Chair	Jane Barker
Vice-Chair	Eileen Powell
Secretary	Chris Hardwick
Treasurer	Chris White
Membership Secretary	Maureen Green
Group Coordinator	Lesley Bedford
Webmaster	Gary Tomlin
Beacon Administrator	Vince Barker
Speaker Coordinator	Geoff Clegg
Newsletter Editor	Val Darbyshire up to January 2024; David Powell from February 2024
Finance Officer	Christine Hillis
Projects Officer	John Krushner
Honorary Co-Presidents	David Burbidge & Val Smith

## Interest Group Convenors

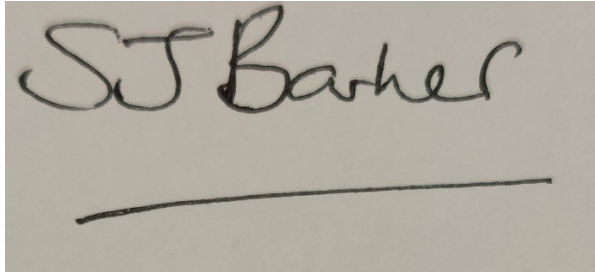
Each of the activity groups has a Convenor to organise their programmes, source, and book venues, arrange subject speakers etc. In turn, they are hugely supported by the Group Coordinator in particular and by the Committee in general.

## Approvals

This report has been approved by the Trustees and signed on their behalf.

**Name:** Jane Barker

**Position:** Chair

A rectangular image showing a handwritten signature in black ink on a light-colored background. The signature reads "SJ Barber" in a cursive style. Below the signature is a single, solid horizontal line.

**Signed:**

**Date:**

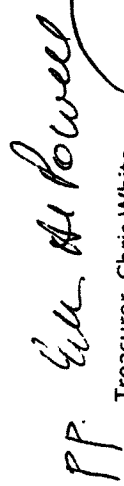
**June 2024**

Chalfonts U3A Accounts for year ending 31 March 2024

<u>Income and Expenditure</u>	<u>31/03/2024</u>	<u>31/03/2023</u>	<u>Balance Sheet</u>	<u>31/03/2024</u>	<u>31/03/2023</u>
<b>Income</b>			<b>Assets</b>		
Membership fees	20293	17124	Bank balances	44133	39368
Gift Aid	4101	2976	Payments in advance/Debtors	0	383
Activities surplus	0	1005	Gift Aid receivable	3900	3000
Miscellaneous income	1682	991	Investment	112	106
<b>Total income</b>	<u>26076</u>	<u>22096</u>	<b>Total assets</b>	<u>48144</u>	<u>42858</u>
<b>Expenditure</b>			<b>Liabilities</b>		
Hire charges	28367	25240	Subscriptions in advance	170	367
less member contributions	16854	15754	Creditors & member payments	21388	19767
Central U3A costs	11513	9486	<b>Total liabilities</b>	<u>21558</u>	<u>20134</u>
Activities-Deficit	7212	6706	<b>Net assets</b>	<u>26586</u>	<u>22723</u>
Administration	173	361	<b>Surplus</b>		
Newsletters	2612	377	Brought forward	22723	17557
<b>Net expenditure</b>	<u>22213</u>	<u>16930</u>	Deficit/Surplus for the period	3863	5166
<b>Deficit/Surplus</b>	<u>3863</u>	<u>5166</u>	<b>Surplus carried forward</b>	<u>26586</u>	<u>22723</u>
				0	

I have examined the Income and Expenditure Account and Balance Sheet and in my opinion they are in accordance with the accounting records, vouchers, bank statements and information supplied to me by Chalfonts U3A.

Signed on behalf of the Committee  
Chair, Jane Barker

PP. 

Treasurer, Chris White





Hon Examiner, Jeffrey G Coteman  
30th June 2024

Chalfonts U3A Accounts for year ending 31 March 2024

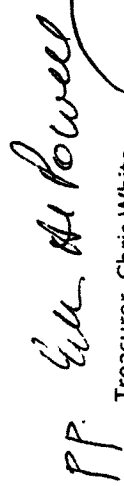
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Central U3A costs	7212	6706
Activities-Deficit	173	
Administration	2612	361
Newsletters	703	377
<b>Net expenditure</b>	<u>22213</u>	<u>16930</u>
<b>Deficit/Surplus</b>	<u>3863</u>	<u>5166</u>

<u>Balance Sheet</u>	<u>31/03/2024</u>	<u>31/03/2023</u>
<b>Assets</b>		
Bank balances	44133	39368
Payments in advance/Debtors	0	383
Gift Aid receivable	3900	3000
Investment	112	106
<b>Total assets</b>	<u>48144</u>	<u>42858</u>
<b>Liabilities</b>		
Subscriptions in advance	170	367
Creditors & member payments	21388	19767
<b>Total liabilities</b>	<u>21558</u>	<u>20134</u>
<b>Net assets</b>	<u>26586</u>	<u>22723</u>
<b>Surplus</b>		
Brought forward	22723	17557
Deficit/Surplus for the period	3863	5166
<b>Surplus carried forward</b>	<u>26586</u>	<u>22723</u>
	0	

I have examined the Income and Expenditure Account and Balance Sheet and in my opinion they are in accordance with the accounting records, vouchers, bank statements and information supplied to me by Chalfonts U3A.

Signed on behalf of the Committee  
Chair, Jane Barker

PP. 

Treasurer, Chris White





Hon Examiner, Jeffrey G Coteman  
30th June 2024