



## **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
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## 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 U3A Accounts for year ending 31 March 2025**

**Receipts and Payments**

**31/03/2025**

**Balance Sheet**

**31/03/2024**

**Receipts**

Membership fees (1)  
Member contributions to activities (2)  
Gift Aid  
Riviera Travel (3)  
Third Age Trust Grant for Feast Day (4)  
Outings surplus (5)  
Miscellaneous income other

22655  
40504  
3770  
1126  
322  
0  
557

ASSETS  
Cash at bank - Lloyds  
Cash at bank - Nat West  
HF Holidays investment  
TOTAL ASSETS  
SURPLUS (14, 15)  
Cash at bank brought forward/investment  
Surplus for the year  
TOTAL SURPLUS

20216  
20383  
3201  
1412  
0  
2222  
912  
48346

**Total receipts**

68934

48346

**Payments**

Hire charges Everyone Active (6)  
Hire Charges CSPCC member activities (7)  
Activity payments (tutors/refunds) (8)  
Membership refunds  
Central U3A costs  
Outings Deficit (9)  
Hire Charges CSPCC CU3A (10)  
Newsletters / Printing / Postage  
Speaker fees/expenses  
New subsidies (11)  
Expenses  
10 year celebration deposits (12)  
Contribution to CSPCC PA SYSTEM (13)  
Miscellaneous expenditure

14900  
15437  
16264  
100  
8287  
894  
1883  
979  
499  
647  
595  
1358  
1000  
728  
63572  
5362

Signed on behalf of the Committee

Chair, John Krushner



Treasurer, Chris White



**Total Payments**

43576

**Deficit/Surplus**

4770

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.

*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.