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Charity Commission Annual Return 2024

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BUCKINGHAM AND DISTRICT U3A
Charity registration number: 1177534

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 2024.

PART A - Charity information

Financial period

Financial period start date	<input type="text" value="01/10/2023"/>
Financial period end date	<input type="text" value="30/09/2024"/>

Income and spending

Income £	<input type="text" value="£ 29,874"/>
Spending £	<input type="text" value="£ 30,067"/>

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?	<input type="text" value="0"/>
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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?	<input type="text" value="0"/>
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Income breakdown

Donations and legacies (excluding Endowments Received)	<input type="text" value="£ 0"/>
Charitable activities	<input type="text" value="£ 28,890"/>
Other trading activities	

£ 8

Investments

£ 0

Other

£ 976

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

£ 0

Other charities

£ 0

Other organisations that are not charities

£ 0

☒

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 England & Wales

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

No

Total Spending outside England & Wales

£

Trading subsidiaries

Does the charity have any trading subsidiaries?

No

Charity contact details correct

Is the contact address displayed from the Register of Charities, correct?

Yes

Charity headquarters details correct

Is this the same address that you use as your charity's administrative headquarters?

Yes

Charity contact address

Address Line 1

5 Hillesden Way

Address Line 2

BUCKINGHAM

Address Line 3

Address Line 4

Address Line 5

Postcode

MK18 1UE

Country

Charity Headquarters address

Address Line 1

5 Hillesden Way

Address Line 2

BUCKINGHAM

Address Line 3

Address Line 4

Address Line 5

Postcode

MK18 1UE

Country

Membership type

Is your charity part of a wider group structure with a parent body and subsidiary bodies?

no, the charity is not part of a wider group structure

Employment contract types

People were permanently employed by your charity

0

People were on fixed-terms contracts with your charity

0

Self-employed people were working for your charity

0

Governance policies

Internal charity financial controls policy and procedures

Yes

Safeguarding policy and procedures

Yes

Financial reserves policy and procedures

Yes

Complaints policy and procedures

Yes

Serious incident reporting policy and procedures

Yes

Internal risk management policy and procedures

Yes

Trustee expenses policy and procedures

Not applicable

Trustee conflicts of interest policy and procedures

Yes

Investing charity funds policy and procedures

Not applicable

Campaigns and political activity policy and procedures

Not applicable

Bullying and harassment policy and procedures

Yes

Social media policy and procedures

Yes

Engaging external speakers at charity events policy and procedures

Yes

Safeguarding

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

return?

No

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?

There were no incidents to report

External risk and impact**Donations**

Unknown/No Change/Not Applicable

Other income - grants

Unknown/No Change/Not Applicable

Other income - contracts

Unknown/No Change/Not Applicable

Other income - investment

Unknown/No Change/Not Applicable

Expenditure on charitable activities

Negative

Expenditure on overheads

Negative

Number of volunteers

Unknown/No Change/Not Applicable

Number of employees

Unknown/No Change/Not Applicable

Number of trustees

Unknown/No Change/Not Applicable

Fundraising activities

Unknown/No Change/Not Applicable

Capacity to deliver services

Unknown/No Change/Not Applicable

Total service demand

Unknown/No Change/Not Applicable

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?

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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

BUCKINGHAM & DISTRICT U3A

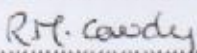
Charity no 1177534

Income Expenditure and Balance Sheet 1 Oct 2023 to 30 Sept2024

	<u>2023-2024</u>	<u>2022-2023</u>
INCOME		
Subscriptions	£12,498.00	£11,473.00
HMRC Gift Aid	£0.00	£1,706.43
Trips using Winslow Bus	£976.30	£922.15
Sales Services	£8.00	
Groups - Venue Contributions	£16,393.38	£13,672.74
	£29,873.68	£27,774.32
EXPENDITURE		
Groups - Room Hire	£15,455.87	£17,266.82
Speakers - Open Meetings	£846.90	£807.50
Open Meetings - Room Hire	£1,775.62	£1,704.40
New Members and GC meetings	£196.83	£111.40
Affiliation to TAT	£3,140.00	£2,888.00
TAM Magazines	£2,366.96	£2,022.67
Trips using Winslow Bus	£976.30	£1,102.75
Printing, Stationery, Postage	£882.16	£1,133.96
IT Costs - Software and Maintenance	£1,436.75	£1,419.92
Licences	£131.41	
Bank Charges	£41.56	£56.04
Entertainment	£300.00	
Miscellaneous	£758.35	£728.46
Refreshments	£1,776.59	£718.59
	£30,067.30	£29,960.71
<i>Surplus/Deficit</i>	<i>-£193.62</i>	<i>-£2,186.39</i>
Add Accum funds b/fwd	£18,291.74	£20,478.13
Funds c/fwd 1 Oct 2024	£18,098.12	£18,291.74
REPRESENTED BY		
CAF Bank - Current Account	£4,254.26	£8,227.52
Lloyds Bank - Subs Account	£16,494.06	£11,134.86
Lloyds Bank - Social Account	£5,235.80	£5,081.36
Less Creditors - short term	-£180.00	-£180.00
Less Subs Received in Advance	-£7,706.00	-£5,972.00
Funds c/fwd 1 Oct 2024	£18,098.12	£18,291.74

Accounts prepared on a cash accounting basis.

Certified to be in accordance with the invoices, vouchers and information given to me.



Hon. Examiner

Date 22.10.24

Notes

Creditors figure is £180.00 ringfenced money held for handbell maintenance.
 Accounts have been prepared on a cash accounting basis.