

# SOUTH EAST U3A FORUM

England & Wales - Charity number 1196999

## Details

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**Status** Registered

**Legal form** Other

**Registered** 2021-12-08

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

## Contact

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**Address** 15 The Glebe  
Trinity Road  
Hassocks  
West Sussex  
Trinity Road  
BN6 9XG

**Phone** 01273835670

**Email** [davash141@gmail.com](mailto:davash141@gmail.com)

**Website** [southeastu3aforum.u3asite.uk](http://southeastu3aforum.u3asite.uk)

## Activities

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**Objects:** 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 THE AREA OF BENEFIT.

**Activities:** The advancement of education of older people and those retired from full time work, by means of: Arranging an annual Summer School; Arranging other activities for large forums as required by the u3a Networks. Such events are mainly for the benefit of u3a members in the South East Region, but extended nationally as appropriate.

## Classification

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- **How:** Provides Advocacy/advice/information
- **What:** Education/training
- **Who:** Elderly/old People, People With Disabilities

## Geography

- Throughout England

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-09-30	£65,720	£64,473	-	-
2024-09-30	£54,918	£54,375	-	-
2023-09-30	£53,575	£53,322	-	-
2022-09-30	£48,579	£46,604	-	-

## Trustees

Name	Role	Appointed
<b>David Ashton</b>	Chair	2021-10-25
Carole Margaret Lillian Dickenson		2021-10-25
Caroline Sawers		2021-10-25
Eleanor Brooks		2026-02-09
KEVIN STOCK		2023-07-17
Patricia Anne Powell		2023-07-17
Richard Geoffrey Teare		2021-10-25

**SOUTH EAST U3A FORUM**

England & Wales - Charity number 1196999

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# Accounts

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**South East u3a Forum**

**Trustees Report and Accounts  
For The Year Ended 30th September 2025**

Registered Charity No. 1196999

## South East u3a Forum

Registered Charity No 1196999

Trustees Report for the Year Ended 30th September 2025

### Principal Office

15 The Glebe,  
Trinity Road,  
Hurstpierpoint,  
West Sussex. BN6 9XG

### Trustees

David Ashton	Chair
Richard Teare	Treasurer
Carole Dickenson	
Caroline Sawers	
Rob White	Resigned 23rd June 2025
Paddy Powell	
Sally Ingledew	resigned 24th March 2025
Kevin Stock	

### Constitution

South East u3a Forum was formally established by a Constitution approved at a Special General Meeting on 21 April 2021, as amended on 25th January 2023 and on 6th August 2024, and registered at the Charity Commission.

### Governance

Trustees are elected from registered member u3a Networks in the South East Region of England, and form the Executive Committee which manages the charity. Trustees are elected annually at the AGM from nominated representatives of the u3a Networks.

### Objectives and Activities

The object of the Forum 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 the Forum Area.

### Achievements and Performance

The Forum's main activity is the facilitation of a Summer School, currently at the University of Chichester. This year's Summer School (SS 2025), held between 1st and 4th September, attracted a record-breaking 159 u3a members from around the UK, who attended 12 courses varying from Psychology and A.I. to Patchwork and Walking.

From course planning and booking, close liaison with the voluntary tutors and the University Conference Team through to onsite delivery, with entertainment every evening, the SS Team ensured another successful event.

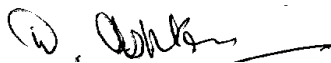
### Financial Review

The Summer School Team was able to install Beacon, the u3a Data Management System, which greatly simplified the recording and management of data and the financial records, enabling up-to-date details to be provided as required by the various Team members.

The Forum made a surplus for the year of £911, which together with Interest Received of £335, totalling £1,246, has been added to the Reserves.

The Trustees are satisfied that the Reserves held are appropriate to the level of risk inherent in running a Summer School.

This Report has been approved by the Trustees and signed on their behalf by:



David Ashton, Chair

24th October 2025

## South East u3a Forum

### Independent Examiner's Report to the Trustees of South East u3a Forum

I report on the Financial Statements of the South East u3a Forum (the Charity) for the year ended 30 September 2025.

### Respective Responsibilities of Trustees and Examiner

The Charity's Trustees are responsible for the preparation of the financial statements and they consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (The Act) and that an independent examination is needed.

It is my responsibility to:

- examine the Financial Statements under section 145 of The Act
- follow the procedures laid down in the general Directions given by the Charities Commission under Section 145(5)(b) of the Act and

to state whether particular matters have come to my attention.

### Basis of Independent Examiner's Report

My examination was carried out in accordance with the general Directions given by the Charities Commission. An examination includes a review of the accounting records kept by The Charity and a comparison of the Financial Statements presented with those records.

### Independent Examiner's Report

In connection with my examination, no matter has come to my attention:

(1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with section 130 of The Act; and
- to prepare financial statements which accord with the accounting records and comply with the accounting requirements to The Act have not been met or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the Financial Statements to be reached.

Signed:



Date

4 November 2025

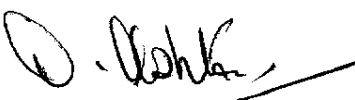
A P Dunk, FCA  
21 Arcadia Road  
Istead Rise  
Gravesend, Kent

# South East u3a Forum

## Balance Sheet at 30th September 2025

	2025		2024	
	Unrestricted		Unrestricted	
	£	£	£	£
<b>Current Assets:</b>				
Debtors				
Balances at Bank:				
Current Account		48		180
Deposit Account		14,492		12,487
		<u>14,541</u>		<u>12,667</u>
Less:				
<b>Current Liabilities:</b>				
Accrued Expenses		719		91
<b>At 30 September 2025</b>		<b><u>£13,822</u></b>		<b><u>£12,576</u></b>
<b>Financed By:</b>				
<b>Capital Account:</b>				
At 1 October 2024		12,576		12,033
Surplus/deficit for the Year		1,246		543
<b>At 30 September 2025</b>		<b><u>£13,822</u></b>		<b><u>£12,576</u></b>

The Accounts were approved by the Trustees on 24 October 2025 and signed on their behalf by

  
David Ashton

  
Richard Teare

Chair

Treasurer

## South East u3a Forum

### Statement of Financial Activities (Incorporating an Income and Expenditure Account) For the Year Ended 30 September 2025

	30.09.2025		30.09.2024	
	Unrestricted		Unrestricted	
	£	£	£	£
<b>Income</b>				
<b>Summer School</b>				
Course Fees		61,545		51,740
Theatre Tickets		3,780		2,800
Deposits Overpaid		0		0
Sale of Mah Jong Books		60		70.00
<b>Total Income</b>		65,385		54,610
<b>Expenditure</b>				
<b>Summer School</b>				
Accommodation	55,099		46,996	
Theatre Tickets	3,745		2,800	
Travel and Course Expenses	1,069		570	
Tutors Expenses	861		1,066	
Speaker Fees	132		60	
Gratuities	100		100	
Printing and Postage	0		0	
Delegates Refund	1,530		0	
Cancelled Course Refunds	1,245		1,595	
Deposits and Overpaid	675		999	
Publicity	0		0	
		64,456		54,186
<b>Summer School Surplus</b>		929		424
<b>Administrative Expenses</b>				
Committee Expenses	0		41	
Office Expenses	17		148	
		17		189
<b>Net Surplus/-Deficit For The Year</b>		911		235
<b>Deposit Account Interest</b>		335		308
<b>Net Surplus/-Deficit For The Year</b>		£1,246		£543

**SOUTH EAST U3A FORUM**

England & Wales - Charity number 1196999

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# Accounts

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**South East u3a Forum**

**Trustees Report  
For The Year Ended 30th September 2024**

Registered Charity No. 1196999

## South East u3a Forum

Registered Charity No 1196999

Trustees Report for the Year Ended 30th September 2024

### Principal Office

15 The Glebe,  
Trinity Road,  
Hurstpierpoint,  
West Sussex. BN6 9XG

### Trustees

David Ashton	Chair
Richard Teare	Treasurer
Carole Dickenson	
Caroline Sawers	
Rob White	
Paddy Powell	
Sally Ingledew	
Kevin Stock	

### Constitution

South East u3a Forum was formally established by a Constitution approved at a Special General Meeting on 21 April 2021, as amended on 25th January 2023 and on 6th August 2024, and registered at the Charity Commission.

### Governance

Trustees are elected from registered member u3a Networks in the South East Region of England, and form the Executive Committee which manages the charity. Trustees are elected annually at the AGM from nominated representatives of the u3a Networks.

### Objectives and Activities

The object of the Forum 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 the Forum Area.

### Achievements and Performance

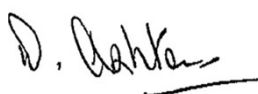
The Forum's main activity is the facilitation of a Summer School, currently at the University of Chichester. This year's event saw 137 attendees, (plus 12 tutors and 2 admin) enjoy a variety of courses, on which the feedback received has shown this year's event to be one of the most successful.

### Financial Review

The Forum made a surplus for the year of £543 which has been added to the Reserves. The Trustees are satisfied that the Reserves held are appropriate to the level of risk inherent in running a Summer School.

This Report has been approved by the Trustees and signed on their behalf by:

David Ashton, Chair



31 October 2024

## South East u3a Forum

### Independent Examiner's Report to the Trustees of South East u3a Forum

I report on the Financial Statements of the South East u3a Forum (the Charity) for the year ended 30 September 2024.

### Respective Responsibilities of Trustees and Examiner

The Charity's Trustees are responsible for the preparation of the financial statements and they consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (The Act) and that an independent examination is needed.

It is my responsibility to:

- examine the Financial Statements under section 145 of The Act
- follow the procedures laid down in the general Directions given by the Charities Commission under Section 145(5)(b) of the Act and to state whether particular matters have come to my attention.

### Basis of Independent Examiner's Report

My examination was carried out in accordance with the general Directions given by the Charities Commission. An examination includes a review of the accounting records kept by The Charity and a comparison of the Financial Statements presented with those records.

### Independent Examiner's Report

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
- to keep accounting records in accordance with section 130 of The Act; and
  - to prepare financial statements which accord with the accounting records and comply with the accounting requirements to The Act have not been met or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the Financial Statements to be reached.

Signed:



Date 11th November 2024

A P Dunk, FCA  
21 Arcadia Road  
Istead Rise  
Gravesend,  
Kent

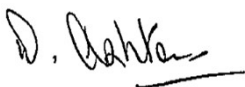
South East u3a Forum

Balance Sheet at 30th September 2024

	<b>2024</b>		<b>2023</b>	
	<b>Unrestricted</b>		<b>Unrestricted</b>	
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Current Assets:</b>				
Debtors				
Balances at Bank:				
Current Account	180		2,447	
Deposit Account	<u>12,487</u>		<u>10,805</u>	
		12,667		13,252
Less:				
<b>Current Liabilities:</b>				
Accrued Expenses		91		1,219
<b>At 30 September 2024</b>		<b><u>£12,576</u></b>		<b><u>£12,033</u></b>
<b>Financed By:</b>				
<b>Capital Account:</b>				
At 1 October 2023		12,033		11,680
Surplus/deficit for the Year		543		353
<b>At 30 September 2024</b>		<b><u>£12,576</u></b>		<b><u>£12,033</u></b>

The Accounts were approved by the Trustees on 31st October 2024 and signed on their behalf by:

David Ashton  
Chair



Richard Teare  
Treasurer



## South East u3a Forum

### Statement of Financial Activities (Incorporating an Income and Expenditure Account) For the Period Ended 30 September 2024

	30.09.2024 Unrestricted		30.09.2023 Unrestricted	
	£	£	£	£
<b>Income</b>				
<b>Summer School</b>				
Course Fees		51,740		51,043
Theatre Tickets		2,800		0
Deposits Overpaid		0		2,395
Sale of Mah Jong Books		70.00		0
		<b>54,610</b>		<b>53,438</b>
<b>Expenditure</b>				
<b>Summer School</b>				
Accommodation	46,996		48,490	
Theatre Tickets	2,800		0	
Travel and Course Expenses	570		737	
Tutors Expenses	1,066		502	
Speaker Fees	60		102	
Gratuities	100		100	
Cancelled Course Refunds	1,595		893	
Deposits and Overpaid	999		2,395	
Publicity	0	54,186	0	53,219
		<b>54,186</b>		<b>53,219</b>
<b>Summer School Surplus</b>		424		219
<b>Administrative Expenses</b>				
Committee Expenses	41		3	
Office Expenses	148		0	
		189		3
<b>Net Surplus/-Deficit For The Year</b>		<b>235</b>		<b>216</b>
Deposit Account Interest		308		137
<b>Net Surplus/-Deficit For The Year</b>		<b>£543</b>		<b>£353</b>

**SOUTH EAST U3A FORUM**

England & Wales - Charity number 1196999

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# Accounts

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**South East u3a Forum**

**Trustees Report  
For The Year Ended 30th September 2023**

Registered Charity No. 1196999

## South East u3a Forum

Registered Charity No 1196999

### Trustees Report for the Year Ended 30th September 2023

#### Principal Office

15 The Glebe,  
Trinity Road,  
Hurstpierpoint,  
West Sussex. BN6 9XG

#### Trustees

David Ashton	Chair	
Richard Teare	Treasurer	
Alan Beebe		Resigned 28th November 2023
Carole Dickenson		
Louisa Sewell		Resigned 28th November 2023
Helen Turner	Co-opted	Resigned 28th November 2023
Caroline Sawers		
Rob White		
Paddy Powell		Appointed 28th November 2023
Sally Ingledew		Appointed 28th November 2023
Kevin Stock		Appointed 28th November 2023

#### Constitution

South East u3a Forum was formally established by a Constitution approved at a Special General Meeting on 21 April 2021, as amended on 25th January 2023, registered at the Charity Commission,

#### Governance

Trustees are elected from registered member u3a Networks in the South East Region of England, and from the Executive Committee which manages the charity. Trustees are elected annually at the AGM from nominated representatives of the u3a Networks.

#### Objectives and Activities

The object of the Forum 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 the Forum Area.

#### Achievements and Performance

The Forum's main activity continues to be the facilitation of a Summer School, currently at the University of Chichester. This year's event saw 151 attendees enjoy eleven different courses. Although one course had to be cancelled after the tutor was unable to attend the event proved very successful.

#### Financial Review

The Forum made a surplus for the year from the Summer School of £253 which has been added to the Reserves. The Trustees are satisfied that the Reserves held are appropriate to the level of risk inherent in running a Summer School.

This Report has been approved by the Trustee's and signed on their behalf by:

David Ashton, Chair



Date: 8th November 2023

## South East u3a Forum

### Independent Examiner's Report to the Trustees of South East u3a Forum

I report on the Financial Statements of the South East u3a Forum (the Charity) for the year ended 30 September 2023.

### Respective Responsibilities of Trustees and Examiner

The Charity's Trustees are responsible for the preparation of the financial statements and they consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (The Act) and that an independent examination is needed.

It is my responsibility to:

- examine the Financial Statements under section 145 of The Act
- follow the procedures laid down in the general Directions given by the Charities Commission under Section 145(5)(b) of the Act and to state whether particular matters have come to my attention.

### Basis of Independent Examiner's Report


My examination was carried out in accordance with the general Directions given by the Charities Commission. An examination includes a review of the accounting records kept by The Charity and a comparison of the Financial Statements presented with those records.

### Independent Examiner's Report

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
- to keep accounting records in accordance with section 130 of The Act; and
  - to prepare financial statements which accord with the accounting records and comply with the accounting requirements to The Act have not been met or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the Financial Statements to be reached.

Signed:



Date

13 November 2023

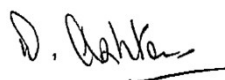
A P Dunk, FCA  
21 Arcadia Road  
Istead Rise  
Gravesend,  
Kent

## South East u3a Forum

### Balance Sheet at 30th September 2023

	2023 Unrestricted		2022 Unrestricted	
	£	£	£	£
<b>Current Assets:</b>				
Debtors				
Balances at Bank:				
Current Account	2,347		5,408	
Deposit Account	10,805		6,668	
		13,152		12,076
Less:				
<b>Current Liabilities:</b>				
Accrued Expenses		1,219		396
<b>At 30 September 2023</b>		<b>£11,933</b>		<b>£11,680</b>
 <b>Financed By:</b>				
 <b>Capital Account:</b>				
At 1 October 2022		11,680		9,705
Surplus/Deficit for the Year		253		1,975
<b>At 30 September 2023</b>		<b>£11,933</b>		<b>£11,680</b>

The Accounts were approved by the Trustees on 8th November 2023 and signed on their behalf by



David Ashton

Chair



Richard Teare

Treasurer

## South East u3a Forum

### Statement of Financial Activities (Incorporating an Income and Expenditure Account) For the Year Ended 30 September 2023

	30.09.2023		30.09.2022	
	Unrestricted		Unrestricted	
	£	£	£	£
<b>Income</b>				
<b>Summer School</b>				
Course Fees		50,943		45,560
Theatre Tickets		0		2,460
Wrong u3a receipt		0		26
Deposits Overpaid		2,495		530
Other				
<b>Total Income</b>		<b>53,438</b>		<b>48,576</b>
<b>Expenditure</b>				
<b>Summer School</b>				
Accommodation	48,490		39,344	
Theatre Tickets	0		2,520	
Travel and Course Expenses	737		457	
Tutors Expenses	502		327	
Speaker Fees	102		0	
Gratuities	100		100	
Printing and Postage	0		144	
Cancelled Course Refunds	893		2,670	
Wrong u3a Payments	0		26	
Deposits and Overpaid	2,495		530	
Publicity	0		35	
		53,319		46,153
<b>Summer School Surplus</b>		<b>119</b>		<b>2,423</b>
<b>Administrative Expenses</b>				
Committee Expenses	3		30	
Commemorative Tree and Plaque	0		91	
Recognition Gifts	0		331	
		3		451
<b>Net Surplus/-Deficit For the Year</b>		<b>116</b>		<b>1,972</b>
<b>Deposit Account Interest</b>		137		3
<b>Net Surplus/Deficit For the Year</b>		<b>£253</b>		<b>£1,975</b>

**SOUTH EAST U3A FORUM**

England & Wales - Charity number 1196999

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# Accounts

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**South East u3a Forum**

**Trustees Report  
For The Year Ended 30th September 2022**

**Registered Charity No 1196999**

## South East u3a Forum

Registered Charity No 1196999

Trustees Report for the Year Ended 30th September 2022

### Principal Office

15 The Glebe,  
Trinity Road,  
Hurstpierpoint,  
West Sussex  
BN6 9XG

### Trustees

David Ashton	Chair
Richard Teare	Treasurer
Alan Beebe	
Carole Dickenson	
Louisa Sewell	
Helen Turner	Co-opted
Caroline Sawers	
Rob White	

### Constitution

South East u3a Forum was formally established by a Constitution approved at a Special General Meeting on 21 April 2021, registered at the Charity Commission, and is affiliated to The Third Age Trust.

### Governance

Trustees are elected from registered member u3a Networks in the South East Region of England, and form the Executive Committee which manages the charity. Trustees are elected annually at the AGM from nominated representatives of the u3a Networks.

### Objectives and Activities

The object of the Forum 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 the Forum Area.

### Achievements and Performance

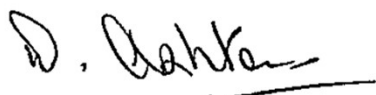
The Forum held a successful Summer School, the first since 2019 after the easing of restrictions due to the Covid pandemic, at Chichester University, with a total attendance of 128 members of u3as around the United Kingdom and Islands. In recognition of 40 years of The Third Age Trust, and sixteen successful years of the Summer School at Chichester University, a commemorative tree, with appropriate plaque, was planted by the Mayor of Chichester.

### Financial Review

The Forum made a surplus for the year from the Summer School of £1,975 which has been added to the Reserves. The Trustees are satisfied that the Reserves held are appropriate to the level of risk inherent in running a Summer School.

This Report has been approved by the Trustee's and signed on their behalf by:

David Ashton, Chair



Date: 24th October 2022

## South East u3a Forum

### Independent Examiner's Report to the Trustees of South East u3a Forum

I report on the accounts of the Charity for the year ended 30th September 2022, which are set out on pages 3 and 4.

### Respective Responsibilities of Trustees and Examiner

The charity Trustees are responsible for the preparation of the accounts. The charity Trustees consider that

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act 2011 (The Act)
- to follow the procedures laid down in the General Directions given by the Charity Commission under section 145 (b) of The Act and
- to state whether particular matters have come to my attention.

### Basis of Independent Examiner's Report

My examination was carried out in accordance with the General Directions given by the Charity Commission.

### Independent Examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
- to keep accounting records in accordance with section 130 of The Act and
  - to prepare accounts which accord with the accounting records and comply with the accounting requirements of The Act

have not been met or

- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed:

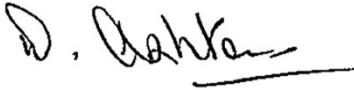


7th November 2022

A P Dunk, FCA  
21 Arcadia Road  
Istead Rise  
Gravesend,  
Kent

## South East u3a Forum

### Balance Sheet at 30th September 2022

	2022		2021	
	Unrestricted		Unrestricted	
	£	£	£	£
<b>Current Assets:</b>				
Debtors				
Balances at Bank:				
Current Account	5,408		3,040	
Deposit Account	6,668		6,665	
		12,076		9,705
Less:				
<b>Current Liabilities:</b>				
Accrued Expenses		396		0
<b>At 30 September 2022</b>		<b>11,680</b>		<b>9,705</b>
<b>Financed By:</b>				
<b>Capital Account:</b>				
At 1 October 2021		9,705		9,744
Profit/-Loss for the Year		1,975		-39
<b>At 30 September 2022</b>		<b>11,680</b>		<b>9,705</b>
Signed on behalf of the Trustees by:	David Ashton			
				
Date: 24th October 2022				
		3		

## South East u3a Forum

### Statement of Financial Activities (Incorporating an Income and Expenditure Account)

For the Year Ended 30th September 2022

	2022		2021	
	Unrestricted		Unrestricted	
	£	£	£	£
<b>Income</b>				
<b>Summer School</b>				
Course Fees		45,560		
Theatre Tickets		2,460		
Wrong u3a receipt		26		
Deposits Overpaid		530		
Other				
<b>Total Income</b>		<b>48,576</b>		<b>0</b>
<b>Expenditure</b>				
<b>Summer School</b>				
Accommodation	39,344			
Theatre Tickets	2,520			
Travel and Course Expenses	457			
Tutors Expenses	327			
Gratuities	100			
Printing and Postage	144			
Cancelled Course Refunds	2,670			
Wrong u3a Payments	26			
Deposits Overpaid	530			
Publicity	35			
		<b>46,153</b>		<b>0</b>
<b>Summer School Surplus</b>		<b>2,423</b>		<b>0</b>
<b>Administrative Expenses</b>				
Postage/Stationery				
Committee Expenses	30		40	
Commemorative Tree and Plaque	91			
Recognition Gifts	331			
		<b>451</b>		<b>40</b>
<b>Net Surplus/Deficit For ThePeriod</b>		<b>1,972</b>		<b>-40</b>
<b>Deposit Account Interest</b>		<b>3</b>		<b>1</b>
<b>Net Surplus/Deficit For The Period</b>		<b>1,975</b>		<b>-39</b>
		<b>4</b>		