

Banbridge District U3A

Northern Ireland · Charity number 107631

Details

Status	Received
Registered	2020-09-01
Register	View on the Charity Commission for Northern Ireland register

Contact

Address
41 Drumneath Road
Banbridge
Co. Down
Bt32 4ej
BT32 4EJ

Phone 07867803585

Email banbridgeu3a@gmail.com

Website www.banbridgeu3a.org

Activities

Purposes: To advance education and in particular the education of people not in full time gainful 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 Banbridge District.

What the charity does: The advancement of education

How the charity works: Community development, Education/training

Who the charity helps: Older people, Voluntary and community sector

Finances

Period end	Income	Expenditure	Assets	Employees
2026-03-31	£5,665	£4,831	£0	0
2025-03-31	£4,190	£2,928	£0	0

Trustees

Name	Role	Appointed
Anne Lavery		
Mr Brain Minnis		
Mr Cathal Mcalister		
Mr Keith Roper		
Mr Thomas Fairley		
Mrs Gabrielle Graham		
Mrs Helen Tranmer		
Mrs Jill Noble		
Mrs Sharon Henry		
Mrs. Sue Dale		
Ms Florence Chambers		

Banbridge District U3A

Northern Ireland - Charity number 107631

Accounts

Independent Examiner's report to the Charity Trustees of Banbridge District U3a

I report on the accounts of the Trust for the year ended 31 March 2026.

Respective responsibilities of charity trustees and examiner

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the Charities Act (Northern Ireland) 2008.

It is my responsibility to:

- examine the accounts under section 65 of the Charities Act
- follow the procedures laid down in the general Directions given by the Commission under section 65(9)(b) of the Charities Act
- state whether particular matters have come to my attention.

Basis of independent examiner's report

I have examined your charity accounts as required under section 65 of the Charities Act and my examination was carried out in accordance with the general Directions given by the Charity Commission for Northern Ireland under section 65(9)(b) of the Charities Act. My examination included a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also included consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as charity trustees concerning any such matters.

My role is to state whether any material matters have come to my attention giving me cause to believe:

1. That accounting records were not kept in accordance with section 63 of the Charities Act
2. That the accounts do not accord with those accounting records
3. That the accounts do not comply with the accounting requirements of the Charities Act
4. That there is further information needed for a proper understanding of the accounts to be reached.

I have completed my examination and have no concerns in respect of the matters (1) to (4) listed above and, in connection with following the Directions of the Charity Commission for Northern Ireland, I have found no matters that require drawing to your attention.

Leslie White

ic April 2026

BANBRIDGE DISTRICT U3A STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDING 31 MARCH 2026

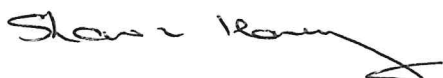
RECEIPTS	2025-26	2024-25
Members's subscriptions	4335	3900
Deposits for summer outing	450	290
u3a Bridge Club	880	0
TOTAL RECEIPTS	5665	4190

PAYMENTS

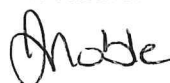
Payments to Third Age Trust		
(a) For membership	536	512
(b) For magazines	571	422
Bank Charges - Danskebank	52	62
Speaker Fees	150	210
<u>Hire of Hall</u>		
Bannside Church Hall	353	300
Ballydown Church Hall	40	0
Bridge Club Bannside Rental	880	0
Funding for U3A Groups	43	84
Refreshment Expenses	99	44
Secretarial Expenses	285	218
Summer Outing	1205	554
Christmas Food Expenditure	617	522
Total Expenditure	4831	2928
Surplus Funds for the year	834	1262
Funds brought forward from previous year	4524	3262
TOTAL FUNDS at 31 MARCH 2026	5358	4524
Statement of Assets & Liabilities	31/03/2026	31/03/2025
Bank Balance	5358	4524

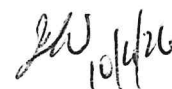
Approved by the Trustees at a Meeting on 14/4/26 and signed on their behalf by:

Chairman



Treasurer





Banbridge District U3A

Northern Ireland - Charity number 107631

Accounts

BANBRIDGE DISTRICT U3A STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDING 31 MARCH 2025

RECEIPTS	2024-25	2023-24
Members's subscriptions	3900	2785
Deposits for summer outing	290	80
Donation to Christmas Party	0	10
TOTAL RECEIPTS	<u>4190</u>	<u>2875</u>

PAYMENTS

Payments to Third Age Trust		
(a) For membership	512	448
(b) For magazines	422	333
Bank Charges -		
Danskebank	62	46
Speaker Fees/Donations to Charity	210	90
Hire of Hall		
Bannside Church Hall	300	414
Ballydown Church Hall	0	40
Funding for U3A Groups	84	0
Refreshment Expenses	44	43
Secretarial Expenses	218	117
Summer Outing	554	300
Christmas Food Expenditure	522	317
Total Expenditure	<u>2928</u>	<u>2148</u>
Surplus Funds for the year	1262	727
Funds brought forward from previous year	3262	2535
TOTAL FUNDS at 31 March 2025	<u>4524</u>	<u>3262</u>
Statement of Assets & Liabilities	31/03/2025	31/3/2024
Bank Balance	£4524	£3262

Approved by the Trustees at a Meeting on 8 APR 25 and signed on their behalf by:

Chairman

Sharon Henry

Treasurer

Mable

Banbridge District U3A

Northern Ireland - Charity number 107631

Accounts

BANBRIDGE DISTRICT U3A STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDING 31 MARCH 2024

	2023-24	2022-23
<u>RECEIPTS</u>	£	£
Members's subscriptions	2785	3130
Deposits for summer outing	80	20
Donation to set up Danske Bank account	0	10
Donation Xmas Party	10	
TOTAL RECEIPTS	<u>2875</u>	<u>3160</u>
 <u>PAYMENTS</u>		
Payments to Third Age Trust		
(a) For membership	448	388
(b) For magazines	333	215
Bank Charges -		
Santander	0	60
Danskebank	46	28
Solicitor's Fee	0	20
Speaker Fees/Donations to Charity	90	120
Hire of Hall		
Banbridge Town Football Club Hall	0	50
Bannside Church Hall	414	113
Ballydown Church Hall	40	0
Auditor Fee	0	50
Refreshment Expenses	43	97
Secretarial Expenses	117	88
Summer Outing Subsidy	300	270
Christmas Food Expenditure	317	180
Total Expenditure	2148	1679
Surplus Funds for the year	727	1481
Funds brought forward from previous year	2535	1054
TOTAL FUNDS at 31 March 2024	£3262	£2535
Statement of Assets & Liabilities	31/03/2024	31/03/2023
Bank Balance	£3262	£2535

Approved by the Trustees at a Meeting on9/4/24..... and signed on their behalf by:

Chairman *Veronica Barrett*

Treasurer *John*

Banbridge District U3A

Northern Ireland - Charity number 107631

Annual report

Banbridge District u3a Reports

Chairperson's Annual Report for the year 1st April 2023 to 31st March 2024

To start I am happy to be able to report that Banbridge District u3a has continued to recover from the effects of the pandemic with membership carrying on its creep upwards during the past 12 months. By the end of the membership year in March numbers had reached 130. So far 71 people have paid their membership fees for the current year, with many choosing to wait until April/May to do so.

The format of u3a events, available to all members, has continued unchanged in the past year. We have a monthly general meeting plus smaller interest group meetings, which can be on a weekly, fortnightly or monthly basis, depending on the wishes of each subgroup.

The very satisfactory venue for our monthly general meeting has mostly continued to be Bannside Presbyterian church hall. The exceptions were June, when we went on our planned outing to Lissan House and December when a church member's funeral meant that the hall was not available. Fortunately, our secretary, Sharon Henry, was able, at short notice, to secure Ballydown Presbyterian Church Hall and our Christmas party event went ahead there successfully.

There are currently 10 functioning interest groups, ranging in size from approximately 5 to 20 members. Some groups such as the walkers have gone on successfully through various membership changes for many years. The most recent development during the past year has been the setting up of a pickle ball playing group which is proving to be very popular. They meet weekly in the leisure centre. Less positively we lost our Current affairs discussion group when Adrian and Joan Howlett moved to live in England. They had been u3a stalwarts from its beginning in Banbridge and were the guiding lights in this discussion group which they ran in their own home.

As our membership grows it would be desirable if further interest groups could be encouraged. The committee recently decided that groups can apply for a 50 pounds draw down from our central fund to help with group start up or equipment replenishment costs. The u3a is an organisation with a "help yourself" mentality in creating opportunities and interests for its members. I would urge anyone with new ideas for leisure activities or learning which would benefit members to please put them forward.

The annual requirement for a report to the charity's commission was met in January. This was our second year in meeting this requirement and was much easier than the year. The report and attachments have to be submitted online, and the biggest difficulty is to achieve attaching. I have to thank my husband Ken for his help in figuring out how to do it.

In February we made an application to the council for a Take 500 grant with which we had hoped to be in a position to cover the cost of a hired bus for our annual June outing and have funds for further advertising of our existence to potential new recruits. Our organisation was deemed eligible to apply and like every other such organisation we had to attend a marketplace event in the leisure centre on 9th March to seek community votes for our application. I would like to thank all the current committee members for the effort they put into this application but sadly it was ultimately unsuccessful, as were two thirds of all applicants. (Can I congratulate our member Geraldine Foley who is a leading light in the Inland Waterways on the success of their application!)

We will therefore be sticking with our existing shared car transport arrangement for our annual outing. The committee has now decided that our outing will be to Downpatrick on 11th June with the usual start point from Tesco's car park. We will leave at 8.50am intending to arrive at Downpatrick cathedral at 10am where we will have tea/coffee and a tour. We plan to visit Saul church at around 11am, get to St Patrick's centre at approximately 12.30 for lunch followed by their film show, move on to Down County Museum at approximately 1.30pm and leave for home at around 3pm. We will have Clive Schooler as a guide during our visit. The cost of visitor fee/tea/coffee at the cathedral plus Clive's fee will be met from central funds. Attending individuals will need to pay for their lunch at St Patrick's centre and the usual car share costs. Those interested can put their names on a list today or at next month's meeting when 10 pounds deposits per person will also be collected

Finally in addition to the requirement to have annual elections for all members of the committee, u3a has the very sensible rule that Chairpersons, Secretaries and Treasurers have time limited overall periods in office. Covid rather bent these rules but now that we are back on normal tracks it is time for me to step out of the role of chair. Could I make the point that in order for us all to benefit we need to have a healthy turnover of members prepared to serve on the committee and be part of decision making for our u3a. I have been very lucky in having such supportive committee members not only during the past year but also in those who have served in previous years while I have been chairperson. I would like to take this opportunity to thank them all. Hereafter I will of course continue to be a keen member, but it is now up to a new generation to take our u3a forward. Wishing u3a all the best in 2024 /25 I now hand over to Mavis Turner from Belfast u3a to run our AGM voting process.

Signed: Veronica Barrett

9 April 2024

Trustees Reports to Charity Commission

BANBRIDGE DISTRICT u3a Annual Reports for the year 1st April 2023 to 31st March 2024

Reference and Administration Information

Name of Charity: Banbridge District u3a
Charity Registration Number: NIC 107631
Address of principal officer
C/o: Sharon Henry - Chairperson, Banbridge u3a
41 Drumneath Road, Banbridge, BT32 4EJ

Names of Trustees

Veronica Barrett
Sharon Henry
Jill Noble
Keith Roper
Peter Kearns
Anne Buggy
Anne Lavery
Florence Chambers
Gabrielle Graham

Structure Governance and Management

The governing document of the Charity is its Constitution as adopted initially at the Annual General meeting held on 12th April 2016 and reviewed/updated at the Special General Meeting held on the 14th January 2020. The Trustees are the members of the Executive Committee, elected by the membership at the Annual General meetings (or occasionally co-opted). The Charity is affiliated to the Third Age Trust (Charity no ; 288077) ,the co-ordinating body for u3a groups within the UK.

Objectives and Activities, Achievements and Performance.

Banbridge u3a is devoted in its commitment as set out in article 3 of its Constitution i.e. to advance education and in particular the education of people not in full time gainful employment who are in their third age residing in Banbridge District.

The activities undertaken during the year as outlined in reports below are evidence of that continuing commitment.

Financial Review

See accounts and Treasurer's report for 12 months ending 31st March 2024 . These have been approved by the charity's independent examiner (See separate reports).

Committee Activities.

The Executive Committee meet monthly in the community room of a local supermarket. Monthly General meetings are held in a local church hall. These meeting run from September to May each year. The June gathering takes the form of a planned outing.

Membership

Membership has continued to grow; we are delighted to report that membership stands at 130 members. A considerable number of our members have been with us for some time, but we have also welcomed numerous others with new skills and interests they are willing to share. Communication is maintained through a monthly Newsletter circulated by email or post to all the members – the vast majority are on email. This updates everyone on both the monthly meetings and on interest group activities, however most of the interest groups also use What's App messaging in respect of their specific activity. Our website is kept updated and details how new people can get in touch and become involved.

The annual membership subscription remains at £20 per person.

Interest Groups and Activities.

In keeping with the u3a movement, Interest Groups, are the evolving life blood of Banbridge u3a with new groups emanating based on the current interest, knowledge and skills of members. Activities currently include groups for Walking, Badminton, Pickle Ball, Art, Photography, Craft, Family history, Historical outings, Board and card games, Flower arranging.

Each group is steered by a facilitator and occur on weekly, fortnightly or monthly basis depending on the activity. Meetings not only avoid social isolation and encourage learning, but also support mental and physical health and wellbeing in a membership made up of third agers.

Monthly Meetings of members.

These meetings, with a speaker, to which all members are invited were held from September to November. In December a social event took place, at which a quiz was held, and finger food provided. Physical monthly meetings resumed in January and the u3a year culminated in an outing to a historic castle in June 2023.

The executive committee pools its knowledge to identify a wide variety of speaker topics, (local history/culture to) during the year which results in an excellent mixture of culture, entertainment and education. We plan to continue with this combination of talks and events which meet the wishes of our membership.

Concluding remarks

We are delighted to say that Banbridge u3a continues to flourish with members learning new skills and exploring new avenues for living full and active lives after retiring from full time work.

Sharon Henry

Sharon Henry
Chairperson (on behalf of the Trustees)

21 January 2025

Banbridge District U3A

Northern Ireland - Charity number 107631

Annual return

Independent Examiner's report to the Charity Trustees of Banbridge District U3a

I report on the accounts of the Trust for the year ended 31 March 2024.

Respective responsibilities of charity trustees and examiner

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the Charities Act (Northern Ireland) 2008.

It is my responsibility to:

- examine the accounts under section 65 of the Charities Act
- follow the procedures laid down in the general Directions given by the Commission under section 65(9)(b) of the Charities Act
- state whether particular matters have come to my attention.

Basis of independent examiner's report

I have examined your charity accounts as required under section 65 of the Charities Act and my examination was carried out in accordance with the general Directions given by the Charity Commission for Northern Ireland under section 65(9)(b) of the Charities Act. My examination included a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also included consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as charity trustees concerning any such matters.

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I have completed my examination and have no concerns in respect of the matters (1) to (4) listed above and, in connection with following the Directions of the Charity Commission for Northern Ireland, I have found no matters that require drawing to your attention.



Leslie White

22 November 2024

Banbridge District U3A

Northern Ireland - Charity number 107631

Accounts

BANBRIDGE DISTRICT U3A ACCOUNTS FOR THE YEAR ENDING 31 MARCH 2023 AND COMPARISON WITH PREVIOUS YEAR 2021-22

	2022-23		2021-22	
	£	p	£	p
INCOME				
Members' subscriptions	3130	00	1130	00
Deposits for summer outing	20	00		
Donation to set up Danske Bank account	10	00		
EXPENDITURE				
Payments to Third Age Trust				
a) For membership	388	00	210	00
b) For magazines	215	05	148	80
Bank Charges				
a) Santander	60	00	90	00
b) Danske Bank	27	90		
Solicitor's Fee	20	00		
Speaker Fees/Donations to Charity	120	00	50	00
Hire of Hall				
a) Banbridge Town Football Club Hall	50	00	125	00
b) Bannside Church Hall	112	50		
Auditor Fee	50	00		
Refreshment Expenses	97	48	153	50
Secretarial Expenses	88	24	69	47
Summer outing subsidy	270	00		
Christmas food expenditure	180	00		
Total Expenditure	1679	17	846	87
Surplus Funds for the year	1480	83	283	13
Funds brought forward from previous year	1054	37	771	24
Total Funds at 31 March 2023	2535	20		

Banbridge District U3A

Northern Ireland - Charity number 107631

Annual report

U3A

Banbridge District University of the Third Age

Trustees Annual Report for the year

1st April 2022 to 31st March 2023

Reference and Administrative Information

Name of the Charity

The name of the charity is the Banbridge District University of the Third Age.

Other names by which the Charity is known

Banbridge U3A

Registered Charity Number

NIC107631

Address of the Principal Office of the Charity c/o Chair, Banbridge U3A

4 Oakdale, Castlewellan Road, Banbridge. BT32 4RW, Co Down

Names of Trustees

Veronica Barrett

Sharon Henry

Keith Roper

Peter Kearns

Anne Lavery

Gabrielle Graham

Florence Chambers

Jill Noble

Anne Buggy

Structure Governance and Management

The governing document of the Charity is its Constitution as adopted initially at the Annual General meeting, held on 12th April 2016 and reviewed/updated at the Special General Meeting held on the 14th January 2020. The Trustees are the members of the Executive

Committee, elected by the membership at the Annual General meetings (or occasionally co-opted) The Charity is affiliated to the Third Age Trust (Charity no: 288077) , the co-ordinating body for U3A groups within the UK.

Objectives and Activities, Achievements and Performance

Banbridge U3A is devoted in its commitment as set out in article 3 of its constitution i.e. to advance education and in particular the education of people not in full time gainful employment who are in their third age (being the period of time after the first age of childhood dependency and the second age of full time employment and/or parental responsibility) residing in Banbridge District.

The activities undertaken during the year as outlined in reports below are evidence of that continuing commitment.

Financial Review

See accounts and Treasurer's report for 12 months ending 31st March 2023. These have been approved by the charity's independent examiner (See separate reports)

Committee Activities

With the ending of Covid restrictions, monthly executive committee meetings returned to being held in the community room of a local store. These meetings consider and agree on governance issues as they arise. A new venue for the monthly general meeting was found in a local church hall from September 2022 and the meetings were maintained throughout the year. Communication with the membership continues to be maintained via newsletter. The membership fee continues at pre pandemic levels which is enough to maintain liquidity in respect of essential business of the charity and to continue membership of the Third Age Trust.

Membership

In April 2022 we had a membership of 103 members and are delighted to report that this has now increased to 120 members despite the loss, due to changes in their circumstances, of some long term committed members.

The monthly Newsletter is sent by email or post to all the membership - 95% are on email. This updates everyone on both the monthly meetings and on small group activities but most of the small groups also use What's App messaging in respect of their particular activity. Our website is kept updated and details how new people can get in touch and become involved. The annual membership subscription continues to be paid into our charity account and is now overseen by a new Treasurer.

Interest Groups and Activities

In keeping with the U3A movement, Interest Groups are the evolving life blood of Banbridge


U3A with new groups emanating and older groups ceasing, based on the current interest, knowledge and skills of members. Activities currently include groups for Walking, Badminton, Art, Photography, Craft, Family History, Historical Outings, Flower Arranging and Pickle Ball. One interest group has recently been lost due to a membership change but others have started up or attracted a higher level of participation. Since March 2022 venues have been available and all of the groups enjoy meeting physically, as social mixing is an essential part of the U3A ethos. Each group is led by a facilitator and depending on group size, facilitator/venue availability and interest, meetings occur on weekly, fortnightly or monthly basis. Meetings not only prevent social isolation and encourage learning, but also support mental and physical health in a membership made up of third agers.

Monthly Meetings of members

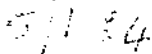
These meetings, with a speaker, to which all members are invited, are held each month with the exception of the holiday months of July and August. There is also a traditional change of format in June and December which applied also in this year. In June 2022 there was a day outing to a historical house and in December 2022 a social event took place, at which a quiz was held and finger foods were provided. The executive committee pools its knowledge to come up with a wide variety of speaker topics, (local history/culture to Wills or funerals) during the year which results in an excellent mixture of culture, entertainment and education. We hope to continue with this mixture of talks and events which meet the wishes of our membership.

Concluding remarks

We are delighted to say that Banbridge U3A has not only survived but continues to grow and change with members learning new skills and exploring new avenues for living full and active lives after retiring from full time work.

Signed 

Veronica Barrett

Dated 

5 January 2024

Veronica Barrett, Chairperson, on behalf of the Trustees of Banbridge U3A

Banbridge District U3A

Northern Ireland - Charity number 107631

Annual return

Independent Examiner's report to the Charity Trustees of Banbridge District U3a

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Leslie White

17th October 2023