

LRU3A – TREASURERS’ PEER SUPPORT GROUP
MEETING – 28th April 2026, 16.00, on Zoom

Join Zoom Meeting (recurring invite):

<https://us02web.zoom.us/j/85941949778?pwd=ZytYSmw4T3llenp2UWtpYzFEWWFHUT09>

Meeting ID: 859 4194 9778

Passcode: 319680

ATTENDEES:

No	u3a NAME	REP NAME		Att	Apol
1	Abbeywood & Thamesmead	Pat	Stratful		
2	Barnet	Johannah	Fischer		
3	Beckenham	Lynn	Edwards		
4	Bexley	Luigi	Lipparelli		
5	Bromley	Gary Jon	Chin Pearce		
6	Crouch End & District	Paul	Smith		
7	Croydon	Barry	Morris		
9	Dulwich & District	Keith	Ball		
10	Ealing	Liz	Major	1	
11	Enfield	??			
12	Hackney	Annie	Nehmad		1
13	Hammersmith and Fulham	Derek	Hodd		
14	HGS	Simon	Freeman (SF)		1
15	Harrow	Anne	Banks		
16	Havering	Graham	Lyons		
17	Hillingdon	Jasia Barbara	Zimmerman Hall	1	
18	Hounslow	Rob	Woods		
19	Islington	Robert Derek	Tench Harwood (DH)	1	1
20	Kenton & District	John	Bishop		
	Kingston	Chris	Cheek		
	London SE	Rod	Press		
	Merton	Ruth	Cooke		
	Mill Hill	Melvyn Jill	??? Haistead		
	Newham	Mairie	Christie		
	North London	Stewart	Maugham		
	Northwood & District	Alan	Morris		1
	Norwood	Lindi	Kibbey (LK)	1	
28	Orpington	Bob	Browne (BB)	1	
29	Palmers Green & District	Tony	McNamara		1
30	Redbridge	Maurice Elaine	Neiberg Mitchell		
31	Richmond upon Thames	John	Cardwell		
32	Sidcup	Georgina	Self		
33	Stanmore District	Martin	Carr		
34	Sutton & District	Chris	McCarthy		
35	Tower Hamlets	Dymphna	Dale		
36	u3a in London	Anthony	Sober		
37	Upminster	Malcolm	Henderson-Begg		
38	Waltham Forest	Christine	Sherret		
39	Wandsworth	Penny	Ryan		1
40	Wanstead & Woodford	Diane	Conway		
41	Welling	Jan	Pitchell		

AGENDA:

1. Previous Actions
2. Gift Aid review
3. Standard Formats – submission to Charity Commission and SORP 2026 Requirements
4. CC8 Use
5. Anything else / open discussion / AOB
6. Next meeting date

Several new Treasurers attended and were welcomed.

SUBJECTS:

1. **Previous Actions:**
None outstanding
2. **Gift Aid Dispute:** Subject is effectively closed now with the Trust having reached a conclusion with HMRC, even although the process and conclusion was unsatisfactory. The Trust's guidance has been updated now on the national website: [Gift Aid Guidance](#). General discussion on the subject. BB highlighted that very recently HMRC had changed their guidance on 'Joint Membership'. See hr: [HMRC Joint / Family Membership](#). This will affect Beacon calculation of Gift Aid. DH to follow up on this – is Beacon being modified for this? Beacon mod is in progress for previous changes (to allow Group cost deduction).
3. **Guidance document for Charity Commission Requirements & SORP:** DH has utilised samples provided to create a new national Guidance document. First draft available (for England and Wales) but needs more work. Draft can be viewed here: [CC Requirements](#). Discussions followed including: Treasurer needs to have a personal CC 'Charity Account' to allow any form of submission; debate re the 'Income Breakdown' - what to put as 'Donations', 'Charitable Activity' or 'Other'. View was should follow Gift Aid basis. So membership subscription should go as Donations, group costs/income should go as 'Charity Activity'. Clarification to be added to Guidance document.
4. **CC8 (Finance Health Checklist):** The CC's version is extensive and seems to have been created for large charities. The Trust's Finance Committee has created a simplified version that u3as might prefer to use. It can be found on the national website here: [Finance Health Checklist](#)
5. **Open Discussions:** there was nothing else arising.
6. **Topics for Next Meeting:** DH asked that ideas be submitted to him, but also advised that if there are any problems arising, or any queries in the interim, these be emailed to DH at any time.

Actions arising: check on Beacon mods for Joint membership; develop further Guidance document for CC Requirements.

Next Meeting(s): meetings will be, every 3 months generally on the 4th Tuesday of the month, at 4.00pm. The next meeting is **Tuesday 28th July 2025, 4.00pm.**

All of these meeting Notes are posted on the LRU3A website, on the Peer Group webpage: <https://lru3a.u3asite.uk/peer-support/>