

ROLLING 3 YEAR CALENDAR FOR MONMOUTH u3a ACTIONS

	2022	2023	2024
January	GDPR doc. review	GDPR doc. review	GDPR doc. review
February	Charity commission accounts for previous financial year (by 31 st March latest) Insurance doc. review	Charity commission accounts for previous financial year (by 31 st March latest) Insurance doc. review	Charity commission accounts for previous financial year (by 31 st March latest) Insurance doc. review
March	TAT magazine renewals Privacy Policy review	TAT magazine renewals Privacy Policy review	TAT magazine renewals Privacy Policy review
April	Submit TAT return Safeguarding doc. review	Submit TAT return Safeguarding doc. review	Submit TAT return Safeguarding doc. review
May	Submit Gift Aid claim Guidelines for Convenors review	Submit Gift Aid claim Guidelines for Convenors review	Submit Gift Aid claim Guidelines for Convenors review
June	30 th - End of financial year Constitution review Terms & Conditions review	30 th - End of financial year Constitution review Terms & Conditions review	30 th - End of financial year Constitution review Terms & Conditions review
July	Info. for new trustees review	Info. for new trustees review	Info. for new trustees review
August	Send out AGM notification to members at least 21 days before AGM Send completed year-end figures to external reviewer & finalise accounts	Send out AGM notification to members at least 21 days before AGM Send completed year-end figures to external reviewer & finalise accounts	Send out AGM notification to members at least 21 days before AGM Send completed year-end figures to external reviewer & finalise accounts
September	AGM Send magazine to Nat. Library of Wales	AGM Send magazine to Nat. Library of Wales	AGM Send magazine to Nat. Library of Wales
October	1 st - start of membership year Role profiles review	1 st - start of membership year Role profiles review	1 st - start of membership year Role profiles review
November	Policy statement review	Policy statement review	Policy statement review
December	Review 3 year rolling calendar External tutor form review	Review 3 year rolling calendar External tutor form review Weebly Pro plan and domain renewal - currently every two years	Review 3 year rolling calendar External tutor form review

