

THE DORCHESTER AND DISTRICT U3A

England & Wales · Charity number 1077305

Details

Other names	UNIVERSITY OF THE THIRD AGE DORCHESTER/WEYMOUTH, U.3.A. DORCHESTER/WEYMOUTH
Status	Registered
Legal form	Other
Registered	1999-09-07
Register	View on the Charity Commission register

Contact

Address Park Farm
Martinstown
Dorchester
Dorset
DT2 9JN

Phone 01305889189

Website www.dorchesteru3a.org.uk

Activities

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.

Activities: Running Courses and Activities for older people in the Dorchester Area.

Classification

- **How:** Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body
- **What:** Education/training, Arts/culture/heritage/science, Amateur Sport, Recreation
- **Who:** Elderly/old People

Geography

- **Area of benefit:** DORCHESTER, WEYMOUTH AND SURROUNDING LOCALITY.
- Dorset

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£33,172	£30,693	-	-
2024-03-31	£42,397	£25,102	-	-
2023-03-31	£27,436	£26,622	-	-
2022-03-31	£13,444	£17,400	-	-
2021-03-31	£12,519	£6,233	-	-

Trustees

Name	Role	Appointed
Sally Hadden	Chair	2025-07-07
Christina Eury Andrews		2024-07-01
Christine Marilyn Langthorne		2022-09-05
Elizabeth Miranda Walsh		2025-07-07
Jayne Elizabeth Jones		2025-07-07
Kathryn Jane Huff		2017-07-10
LESLIE MOULD		2013-01-16
Lesley Ann Winder		2024-07-01
Linda Jane Chappell		2024-07-01
Myles Provis		2024-07-01
NICHOLAS HUGH MAITLAND PRIDDLE		2014-01-24
Stephen Geoffrey Howes		2024-07-01

THE DORCHESTER AND DISTRICT U3A

England & Wales - Charity number 1077305

Accounts

Annual Report

It is an absolute pleasure to report that our u3a is going from strength to strength. We have more members running more groups than ever before and more members enjoying them.

Our membership settled to about 1,100 this year. This is an increase of 120 over last year - a result of gaining 260 new members and having 140 leave. Most of our new members learn about the u3a from existing members, so do make sure your friends who might enjoy the u3a know about us.

One of the real benefits of being a large(ish) u3a is that we are able to support a wider range of groups. Over the year, we added 16 new groups - more than ever before. The new groups were Beer and Cider Appreciation, Birdwatching (re-hatched), Bobbin Lace Making, Calligraphy, Canasta and Bezique, Craftastic, Early Music - Playing, Easy Riders, English Country Dancing, French Beginners, Go, Meditation and Mindfulness, Play Reading 2, Reading - Crime and Thrillers, Skittles and Worldviews. Thanks very much to our very busy Group Coordinator Jane Huff and more recently her deputy, Jayne Jones, for providing the support and guidance to the groups as they get going.

Being large does not suit everything though, especially if you are looking for a convenient way to have coffee and a chat with other members. For members who would like this opportunity, we are supporting the setting up of coffee groups. They are in place for Dorchester Centre and Poundbury, and, at the time of writing, we have members interested in setting up groups in three other locations.

Our growth also puts pressure on some of our more popular groups, and a few have waiting lists. Where we can, we will always try to increase the size of groups or have additional groups to satisfy demand. We are also improving the way we deal with waiting lists to ensure the process is transparent, members know the status, and we have the opportunity to respond.

We should never forget that we are a self-help society, with every group run by one or more members. You don't need to be an expert to lead a group. If you are willing to have a go, just bring enthusiasm, and you will get lots of support to do it. We need to thank 20 members for taking on Group Leader roles for the first time this year. Most took on the new groups, but some, of course, took up the role with an existing group. Five Group Leaders stepped down this year. I would like specifically to mention Andy Davies and Des Derrien, who led the Thursday walking group for many years, and Alan McLeish, who has led the Jazz (now Jazz and Blues) Group for more years than I have been a member.

Vibrant communications make our u3a more than just a discrete set of groups, and we cater for a range of member preferences from enjoying social media to being much more comfortable with hard copy. Our newsletter is the foundation, providing the essential information we need to enjoy the u3a; the Members' Update email keeps us up to date on all the important changes, and the website is always being available as the source of just about all Dorchester u3a information. Many thanks to Jane Huff for compiling the Members' Update, to Janet Gelernter, who is passing the newsletter editor role to Linda Chappell, and the website support team for all their work. We have recently added a private group for those of us who use Facebook to share information on a more ad hoc basis. Thanks to Julie-Ann Booker for supporting this initiative.

The First Monday Meetings continue to be our largest gathering of members. Christina Eury-Andrews took over finding our speakers and has provided us with both variety and excellent quality. My favourite this year has been the story of tunnels and an art teacher's war diary by Mary Smith.

When I consider all the activities we enjoy and all the organisation it takes, I find it impressive the number of members actively involved in making it all work. There are too many individuals to mention them all, but I would like to mention just a few stalwarts - Kate Harre collects the attendance sheets and fees from all Group Leaders and enters

them into the accounts; Ian Blaby has a number of roles, not least being the support and management of all our technical equipment; and for the Monthly Meetings, Kelvin Huff produces the slides, Niall Simpson has guided our parking, and Geraldine and Andrew Farrow are always there to set out the chairs and tables, and Jean Croot and Wendy Hilton continue to organise the tea and coffee service.

While it is heartening that we have so many members leading and supporting our activities, we still have a need for more. We currently have interest in starting five groups but no one to lead them. We find it particularly challenging finding members to join the committee and to perform roles needing technical skills.

Finally, I would like to thank our president, Margaret Pearce, and my committee colleagues. They have all shared the work of the committee and each made a significant contribution to running our u3a. In particular, our membership secretary, Chris Langthorne, and our treasurer, Nick Priddle, work hard to keep the machine's cogs turning.

Three of us leave the committee at the AGM this year. Peter Scaife has been a committee member for 11 years and performed a number of roles. My wife Jane, a committee member for over five years, apart from keeping me under control, has picked the jobs no one else volunteered for— not least organising u3a day, Christmas lunch, and FMM volunteers. I am also stepping down, having done the maximum allowed three years in the Chair. I look forward to having more time to attend some of the groups I have missed and enjoying our u3a for many years to come.

Alan Hopwood, Chair

Dorchester & District u3a

Registered Charity no. 1077305

Income & Expenditure Account for the Year ending 31st March 2025

INCOME	2024/2025	2023/2024
	£	£
Members Subs 24/25	13525.00	14960.00
Members Subs in adv.	5212.00	10437.00
Donations	285.00	197.30
Group meeting fees	9169.90	10659.16
Monthly meetings	583.03	1455.42
HMRC – Gift Aid	743.48	2403.19
Riviera Travel etc	2026.72	1066.55
Advertising	560.00	600.00
Sundry Income	338.42	99.77
Third Age Matters	102.85	233.80
Interest on a/cs	<u>625.52</u>	<u>285.25</u>
Subtotal	33171.92	42397.44
TOTAL	33171.92	42397.44

EXPENDITURE	2024/2025	2023/2024
	£	£
Hall /Room Hire	20434.00	17399.15
u3a Capitation & News	3712.68	3718.75
Capital Expenditure	nil	132.27
Group Expenses	477.52	217.24
Facilities & services	374.06	764.44
Newsletters	3931.01	1758.20
Committee Expenses	120.81	289.91
Speaker fees	480.00	295.00
Refreshments (FMM/NM/GL)	91.50	130.44
Beacon expenses	1056.00	396.66
u3a Day	nil	00.00
Sundries	<u>15.90</u>	<u>00.00</u>
Subtotal	30693.48	25102.06
25/26 subs in advance	5212.00	10437.00
Shortfall for year	<u>-2733.56</u>	<u>+6858.38</u>
TOTAL	33171.92	42397.44

Balance Sheet for the Year ending 31st March 2025:

Accumulated Funds	2024/2025	2023/2024
	£	£
Balance as at 1 st April	30859.56	13564.18
25/26 subs in advance	5212.00	10437.00
Shortfall for the year	<u>-2733.56</u>	<u>+6858.38</u>
TOTAL	33338.00	30859.56

Location of Funds	2024/2025	2023/2024
	£	£
Lloyds Bank current a/c	3596.25	6208.40
Lloyds Bank interest a/cs	29702.10	24576.58
Petty Cash	<u>39.65</u>	<u>74.58</u>
TOTAL	33338.00	30859.56

I have examined the income and receipt vouchers, also the bank statements which support the income and expenditure account for the Year ending 31st March 2025 and am satisfied that they show a true and accurate record of the affairs of the Dorchester & District u3a.

2024/25 Year-end accounts prepared and submitted by :

N.Priddle
(Hon. Treasurer)
Date2025

.....
(Alison Neil, Independent Examiner)
Date2025

Dorchester & District u3a

Registered Charity no. 1077305

Income & Expenditure Account for the Year ending 31st March 2025

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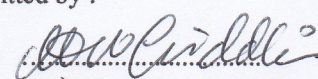
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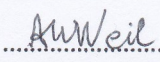
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TOTAL	33338.00	30859.56

2024/25 Year-end accounts prepared and submitted by :

N.Priddle 
 (Hon. Treasurer)
 Date 13.03.2025

I have examined the income and receipt vouchers, also the bank statements which support the income and expenditure account for the Year ending 31st March 2025 and am satisfied that they show a true and accurate record of the affairs of the Dorchester & District u3a.


 (Alison Neil, Independent Examiner)
 Date 13.03.2025

THE DORCHESTER AND DISTRICT U3A

England & Wales - Charity number 1077305

Accounts

Annual Report 2024 Annual Report What an excellent u3a we have. And that is because so many of our members give their time, energy and expertise in order that we can enjoy participating in the u3a. There are too many to name in this report, the Group Leaders, all the people involved in making the Monthly Meeting work, those creating and distributing our Newsletter, supporting the systems, the equipment and keeping the u3a running. I would like to thank them all for helping us get the most from our retirement years. We have had another excellent year for Membership. Our numbers peak at the end of our membership year 31 March and then dip as members who don't renew are removed from the count. Our peak rose from 937 in March 2023 to 1,061 in March 2024 while our "dips" from 861 to 983. During the year we have invited all joiners to a new members' meeting to help them find their way around Dorchester u3a as well as giving background on how the u3a movement works. Feedback at these meetings indicates that the vast majority of new members learn about the u3a by word of mouth from current members. Groups are of course the core of the u3a, the reason why we are members. I am pleased to report that we continue to have a wide and diverse range of Groups to enjoy. We added new and interesting Groups including Wildlife and Conservation, and Card Games for fun. The new Coffee Mornings provide a super way to get together for a chat. We also extended our existing topics with Italian Beginners, French for the Rusty and Still Life painting and drawing being added. Pickleball is quickly becoming the favourite sporting activity with a second Saturday Group. We were very happy to see Music Appreciation restarted thanks to John Cruickshank and Ken Pickering, and Peter Scaife has reinvigorated Theatre Visits, with Terry and Melanie Hooley now assisting. Loyal members are looking forward to Russian Studies restarting when John Laver recovers his health. As is very natural, we also lost some Groups. Both German and French Intermediates closed with the sad loss of Keith Roberts. Bird Watching closed, but expect it to restart soon. Our Membership Survey raised quite a number of suggestions for new Groups. We will test these for support (participation and leading). The survey also allowed members to indicate their wish to volunteer and I am in particular pleased to have six members stepping forward to join the Committee. Our Monthly Meeting continues to feature a wide range of informative and highly entertaining speakers, with topics such as a Vision for Dorchester and the Future of Dorset Health Services, to our local environment - Salisbury Cathedral and Dorset River Tales to highly amusing tales of Royal visits and Portland Curiosities. The numbers attending the Monthly Meeting have gradually grown and some will have benefited from our reintroduction of the hearing loop. We made significant improvement to the way we support our activities by implementing the u3a's Beacon system. The system allows us to maintain more easily our membership and financial records as well as supporting the administration of Groups. A team of members managed the migration of our records onto the new system and the training of Group Leaders and Committee Members in its use. We have extended and tidied up our policy documents adding codes of conduct and complaints policies to the updated Privacy, Data Protection and Safeguarding. All are available on our website. Our Secretary, Carole Richards, undertook a project to scan all our committee records going back to 1995. The hard copies through to 2016 have been lodged with the Dorset History Centre. As you will see from the Treasurer's Report, our financials are in a very healthy state. The benefit of the increase in subscription fee and membership growth allowed us to reduce our attendance fees. We have no expectation of having to increase subscriptions again in the near future. We have had a number of volunteers "retiring" during the year. After many years of preparing the slides for the Monthly Meeting, Bob Brewer handed over the role to Kelvin Huff. Carole Richards has decided to focus her time on being Group Leader for French for the Rusty having spent a very productive year as Secretary. Unfortunately Brenda Down needed to step down as Venues Officer with Beryl Shuttleworth stepping into the breach. And finally, Andy Davies stepped down after many years on the Committee and in several roles, not least of which was in entertaining us at the Monthly Meeting. In addition to retirements, we have had changes of roles. Janet Gelernter has taken over as Newsletter Editor from Jane Huff; Jane has taken over as Group Coordinator from Peter Scaife, with Peter continuing as Welfare Officer. The responses to the membership survey will guide the decisions the Committee takes in the coming months. It did not call for any major changes. We will offer our Newsletter in electronic form and stop sending paper to those who do not want to receive it. It will take a little while to test which of the new Groups suggested are viable, but you will see

them being offered. We expect to continue to grow and will need even more of you not just participating in, but also supporting the activities we enjoy. Alan Hopwood, Chairman

Dorchester & District u3a

Registered Charity no. 1077305

Income & Expenditure Account for the Year ending 31st March 2024

INCOME	2023/2024	2022/2023
	£	£
Members Subs 23/24	14960.00	13605.00
Members Subs in adv.	10437.00	3326.50
Donations	197.30	501.90
Group meeting fees	10659.16	4586.83
Monthly meetings	1455.42	706.02
HMRC – Gift Aid	2403.19	814.49
Riviera Travel	1066.55	2068.11
Advertising	600.00	400.00
Sundry Income	99.77	966.35
Third Age Matters	233.80	51.10
Interest on a/cs	<u>285.25</u>	<u>10.01</u>
Subtotal	42397.44	27036.31
TOTAL	42397.44	27036.31

EXPENDITURE	2023/2024	2022/2023
	£	£
Hall /Room Hire+Zoom	17399.15	16485.36
u3a Capitation & News	3718.75	4873.84
Capital Expenditure	132.27	869.49
Group Expenses	217.24	105.78
Facilities & services	764.44	474.96
Newsletters	1758.20	2609.51
Committee Expenses	289.91	287.37
Speaker fees	295.00	420.00
Refreshments (FMM/NM/GL)	130.44	50.00
Beacon expenses	396.66	00.00
u3a Day	00.00	12.53
Sundries	<u>00.00</u>	<u>33.00</u>
Subtotal	25102.06	26221.84
24/25 subs in advance	10437.00	
Surplus for year	<u>+6858.38</u>	<u>+814.47</u>
TOTAL	42397.44	27186.31

Balance Sheet for the Year ending 31st March 2024:

Accumulated Funds	2023/2024	2022/2023
	£	£
Balance as at 1 st April	13564.18	12749.71
24/25 subs in advance	10437.00	
Surplus for the year	<u>6858.38</u>	<u>814.47</u>
TOTAL	30859.56	13564.18

Location of Funds	2023/2024	2022/2023
	£	£
Lloyds Bank current a/c	6208.40	8195.79
Lloyds Bank interest a/cs	24576.58	5291.33
Petty Cash	<u>74.58</u>	<u>77.06</u>
TOTAL	30859.56	13564.18

2023/24 Year-end accounts prepared and submitted by :

N.Priddle
(Hon. Treasurer)
Date2024

I have examined the income and receipt vouchers, also the bank statements which support the income and expenditure account for the Year ending 31st March 2024 and am satisfied that they show a true and accurate record of the affairs of the Dorchester & District u3a.

.....
(Alison Neil, Independent Examiner)
Date2024

Dorchester & District u3a

Registered Charity no. 1077305

Income & Expenditure Account for the Year ending 31st March 2024

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TOTAL	30859.56	13564.18

2023/24 Year-end accounts prepared and submitted by :

N.Priddle 
 (Hon. Treasurer)
 Date 25/4/2024

I have examined the income and receipt vouchers, also the bank statements which support the income and expenditure account for the Year ending 31st March 2024 and am satisfied that they show a true and accurate record of the affairs of the Dorchester & District u3a.


 (Alison Neil, Independent Examiner)
 Date 25-04-2024

THE DORCHESTER AND DISTRICT U3A

England & Wales - Charity number 1077305

Accounts

Annual Report

While last years report finished with some thoughts on life after the pandemic - “Hopefully the worst is well past and we can continue our happy progress to full normality”, this year I can report on a more normal u3a operation.

We can still see some after effects of the pandemic. A few vulnerable members protect themselves with masks; some are avoiding larger meetings; and we had to take a decision mid-year to strengthen our finances after our room hire rebounded. Nevertheless, my overall message is that Dorchester and District u3a is thriving, with more Groups being enjoyed by more members than ever before.

Groups are the core of every u3a and we have an impressive set both in terms of quantity and variety. This year we added Playing Folk Music, Local History, Mah Jong to BMJA rules, Pickleball, Portraiture, Rummikub and a reawakened Wine Appreciation. In addition, Trips and Outings has been revamped and is thriving with the leadership baton passed from Anna Shapter, after many years as leader, to Libby Wood. Theatre trips is ramping up with Peter Scaife doing an excellent job of selecting shows and gauging member demand.

Of course we lost a few Groups as well, either due to our members’ changing interests or, more usually, the leader moving or retiring. We no longer have Digital Photography, Italian Beginners and Improvers. I will make special mention of Music Appreciation, a very popular Group led by Richard Searle for 16 years. Unfortunately we have not been able to find a new leader.

We now have 63 Groups, all run by members volunteering their time and expertise. I would like to thank the leaders and their helpers, not just for the Groups mentioned, but for all our 63 Groups that make our u3a what it is.

Those of us who have attended our First Monday Meetings (FMM) have enjoyed an amazing range of speakers arranged by Andy Davies. They included authors talking about their writing, a world class expert explaining everything about Spring bulbs, the history of Shire Hall, fascinating insights into multicultural society, a year in the life of our Mayor, the history of glass making and all about Age UK in Dorset. My personal highlight was our member Sir David Haslam interviewed by Andrew Webb on the topic of “What to do about our Healthcare Provision”.

We continued the practice, started as we opened up after Covid Lockdown, of making the FMM available to members via Zoom, and with very few technical glitches. We will discontinue this practice after the AGM and I would like to thank Jane Huff for managing the Zoom sessions from home and Ian Blaby and David Carden for providing support in the Hall.

One of the consequences of our success of Groups getting back to normal meetings was that our costs grew more quickly than expected, bringing the risk of running out of money, not in the current year, but in 2023-2024. At the Special General Meeting in February members supported increasing our annual subscriptions. We also made changes to attendance fees. We had been worried that we would have a considerable number of members forgetting to change their Standing orders for renewals and this did indeed require a lot of chasing. However, our concern that the changes would reduce membership did not come about and we currently have over 880 members. The Group Fayre in January and u3a Day in September were both very successful in attracting new members and we will run both again, although most new members find out about the u3a from current members.

Annual Report 2023

Having now had a full year in the chair, I more fully appreciate and really must express thanks for all the time and effort from my colleagues on the Committee. Mentioning just some of their work, Andy Davies arranges our speakers; Nick Priddle manages all our finances now thankfully with support from Kate Harre for attendance fees and Beryl Shuttleworth for Gift Aid; Peter Scaife initiates and supports all our Groups; Jane Hopwood organises the very popular Christmas lunch, u3a day and keeps attendance records; Jane Huff produces the Members' Updates, website news page and the Newsletter; At a very busy time Chris Langthorne took over processing members joining, renewing and leaving in addition to filling in on the Secretary Role; and Les Mould, after many years as Secretary, is our regional contact and general u3a procedural guru. We also have a very active Honorary President injecting ideas and challenges into our meetings.

I would especially like to thank those who will no longer be on the Committee after the AGM. Janet Kennewell performed a huge role as Membership Secretary for 9 years before stepping down in April. Mike Neely has coordinated our venue bookings for 7 years while Vivienne Allan has, amongst other responsibilities, acted as Welfare officer for an incredible 19 years. All three have made an enormous contribution to our u3a.

I make no apology for also mentioning a few of our stalwarts. Niall Simpson can be seen every FMM managing our car parking. Jean Croot and Wendy Hilton look after the FMM refreshments while Penny Blaby, Beryl Shuttleworth, Libby Wood, and Jean Holmes check members in. Ken Pickering sets out the chairs and Theresa Morton looks after the notice boards. Kelvin Huff has taken an increasing share of website maintenance while Ian Blaby continues to look after our equipment. We have a revolving list of volunteers setting out chairs and doing the Meeting and Greeting. Our volunteers keep our u3a running.

What about prospects for the coming year? I can confidently predict that members will continue to enjoy attending Groups; that they will propose a few new Groups and some will flourish. We have decided to implement the u3a's Membership Management system and, while the transition will take some effort, the result will be to improve our operation and reduce the ongoing work required. Subject to member support, we will welcome our new Committee members taking up their roles. We will also swap around some of the current Committee roles. Finally we will continue to need new volunteers. If you are not already doing so, please consider making your contribution.

Alan Hopwood, Chairman

Dorchester & District u3a

Registered Charity no. 1077305

Income & Expenditure Account for the Year ending 31st March 2023

INCOME	2022/2023	2021/2022
	£	£
Members Subs 22/23	13605.00	11323.80
Members Subs in adv.	3326.50	686.50
Donations	501.90	25.00
Group meeting fees	4586.83	00.00
Monthly meetings	706.02	00.00
HMRC – Gift Aid	814.49	841.80
Riviera Travel	2068.11	65.91
Advertising	400.00	500.00
Misc. Rent & Refunds	250.13	00.00
Sundry Income	966.35	00.00
Third Age Matters	51.10	00.00
Interest on B.B. a/c	10.01	0.50
Subtotal	27436.44	13443.51
TOTAL	27436.44	13443.51

EXPENDITURE	2022/2023	2021/2022
	£	£
Hall /Room Hire+Zoom	16735.49	9222.33
u3a Capitation & News	4873.84	3103.60
Capital Expenditure	868.49	672.02
Group Expenses	105.78	564.38
Facilities & services	474.96	515.57
Newsletters	2609.51	2075.84
Committee Expenses	287.37	310.76
Speaker fees	420.00	402.50
Refreshments (FMM/NM/GL)	50.00	53.89
u3a Network Meetings	00.00	70.00
u3a Day	12.53	380.93
Sundries	33.00	28.00
Subtotal	26621.97	17399.82
Surplus or Deficit for year	+814.47	-3956.31
TOTAL	27436.44	13443.51

Balance Sheet for the Year ending 31st March 2023:

Accumulated Funds	2022/2023	2021/2022
	£	£
Balance as at 1 st April	12749.71	16706.02
Surplus for the year	814.47	
Deficit for the year		3956.31
TOTAL	13564.18	12749.71

Location of Funds	2022/2023	2021/2022
	£	£
Lloyds Bank current a/c	8195.79	7424.12
Lloyds Bank 30 day a/c	5291.33	5281.32
Petty Cash	77.06	44.27
TOTAL	13564.18	12749.71

2022/23 Year-end accounts prepared and submitted by :

N.Priddle
(Hon. Treasurer)
Date 27 April 2023

I have examined the income and receipt vouchers, also the bank statements which support the income and expenditure account for the Year ending 31st March 2023 and am satisfied that they show a true and accurate record of the affairs of the Dorchester & District u3a.

Alison Neil
(Alison Neil, Independent Examiner)
Date 27 April 2023

Dorchester & District u3a

Registered Charity no. 1077305

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