

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.

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(Alison Neil, Independent Examiner)
Date2024

Dorchester & District u3a

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(Hon. Treasurer)

Date 25/4/2024

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(Alison Neil, Independent Examiner)

Date 25-04-2024