



Dulwich and District u3a

Trustees' Report for 2020-2021

At the start of this most unusual year the country was one week into the first national lock down. As all of our usual activities had been stopped overnight, and with healthy funds, the committee immediately took the decision to suspend subscriptions for the membership year commencing on 1st April 2020. Most years some 100 members do not renew but this is more than made up for by new members joining. This year all 2019 members were automatically renewed (at zero cost) and 31 new members joined in the year; there were 720 members on 31st March 2020.

The AGM was postponed for three months so that the new committee was not installed until August 2020, at which time I took over as Chair from Liz Day.

Zoom, Directory and Interest Groups

All this year we have used Zoom as a means of communication and because of its popularity have purchased two Zoom Pro accounts for convenors to use with their groups, with one enhanced account enabling an audience of up to 500 at Open Meetings. We offered tuition to convenors and members in the use of Zoom and as a result now have seventy-six of our ninety-nine groups operating either on Zoom or by other electronic means. Many thanks are due to our convenors for their efforts in embracing the new technology and encouraging their members to do so. Neil Abrahams deserves a special mention for managing and enabling our use of Zoom and facilitating speakers to address our Open Meetings. He has also pioneered our use of closed captioning and recording speakers so that members can view the talks again or at more convenient time on our YouTube channel. Our "turn out" at Open Meetings has been larger than it has ever been.

We published a new Directory of groups clearly indicating which groups were operating and encouraged members to "try something new" as group numbers were no longer constrained by room size. We launched duplicate groups in philosophy and politics and a new, topical group on climate change/ sustainable food.

Diversity

In accordance with the motion passed at the August 2020 AGM a Diversity and Inclusivity sub-committee has been formed which has developed a Diversity and Inclusivity Policy. The group acts as an advisory group to the Trustees' Executive Committee (TEC). An Accessibility Officer is to be appointed at the first TEC meeting after the AGM. The group is involved in our outreach work and in the preparations for the first u3a Day on 2nd June 2021.

Open Meetings

We have doubled our offer of Open Meetings from one to two each month. On the advice of our Diversity sub-committee we have invited a more diverse range of speakers. Two of the Open Meetings have been produced by our own membership and we plan to make "home grown" quizzes a regular feature. We have invited u3a members from other u3as to attend our Open Meetings.

Outreach

Our Outreach sub-committee joined the national u3a's Pathfinder project, claiming our Starter Pack and our grant. With the help of our designer and the Diversity sub-committee we designed several versions of publicity material which we sent out, online, to local organisations and publications. We have had contact with the local press and have made contact with social

prescribing link workers (who are attached to GP surgeries, taking a holistic approach connecting people to community groups and statutory services for practical and emotional support).

The efforts of the Outreach sub-committee have now been subsumed into the effort for the national/local u3a day when we plan to enhance local knowledge of our organisation in Dulwich and its Districts, to attract eligible members who may not have heard of us. We are undertaking this jointly with our neighbour u3a West Norwood.

Website

Our web master attended the “make your website your show case” event and has made improvements to our website. Areas have been updated and slimmed down and several members from Interest Groups have been recruited to add photos and write ups to their own group page. We now have a Google Drive system for storing documents. All TEC minutes are online for members to read for two years before being archived.

Creating ownership to aid retention

Our philosophy is to involve the membership in all aspects of the running of the u3a. As well as the previously mentioned initiatives we have conducted a members’ communications survey and followed up all issues. Following the national re branding we have updated our newsletter and all our written documents with the new logo and charity number and aim to encourage members to make use of the newsletter to communicate with each other and with the Trustees. We sent everyone a season’s greetings card and hold ongoing Zoom coffee mornings for drop in chats. These are very popular. We have continued with our new members’ teas on Zoom. We have initiated a service for members with hearing impairment, holding two useful meetings of over forty people each; we intend that this initiative is carried forward led by the members.

Beacon

We have joined the Beacon system of administration for our membership and financial records. This system is specially designed for u3as to help us maintain GDPR-compliant records.

Trustees’ Executive Committee

Many thanks are due to all members of the Trustees’ Executive Committee who have worked so hard this year, not only embracing new methods of communication but also expanding and enhancing what we do. Many thanks to those who are retiring or resigning to take up other endeavours. Especial thanks go to Susan Elias who is stepping down after six years on the Committee but who will still be helping out, not least by designing quizzes for us to enjoy, to Verity Mosenthal after three years of efficient husbandry as Treasurer and to Joy Harris who has recorded over 320 new members during her three years as Membership Secretary.

2021/2022

For this new membership year we have reintroduced subscriptions at a lower rate of £15 and established a reduced rate subscription for members on a low income. This follows the Third Age principle of enabling all who wish to join to do so.

We are looking forward to another full year of activities and to having the chance to meet up in person as well as online.

Angela Brown
Dulwich and District u3a Chair
April 2021



Treasurer's Report to AGM on 18th May 2021

The summary sheet below shows the accounts for the period 1st April 2020 to 31st March 2021. During this period all our activities were affected by the Coronavirus pandemic and this is reflected in the marked differences from the previous year.

The Trustees Executive Committee quickly decided in March 2020 to suspend membership subscriptions and review the position later. Given the substantial reserve that we started the year with, we were able to keep the year free for members. We still had outgoings: our national subscriptions to the Third Age Trust and the Third Age Matters magazines, Zoom subscriptions instead of room hire, and printing and publicity. In the current year (2021-2022) year we will have no income from Gift Aid, as it is paid based on income in the following year.

The Trustees Executive Committee has encouraged interest groups to apply for funds to enhance their offer to members. About a quarter of the groups had applied at the beginning of 2020 and most had approval. However, very few have spent their money yet, as lockdown intervened. The funds are still available and set aside ready for when conveners are able to resume the relevant activities.

At the end of the financial year we had funds of over £17,000. Our expenditure exceeded our income for the first time, by nearly £7,000. However, we still have a reserve on deposit of approximately one year's expenditure which is more than the six months recommended by the Third Age Trust.

After a careful budget exercise the Trustees agreed to a subscription level of £15 for the current year (2021-2022). We have also increased the discount for members paying the full fee to another u3a, and a concession rate for those on a low income. One consequence of the decision not to charge subscriptions was that we did not have up-to-date information on the number of active members. In fact before the end of April well over 400 of the 720 previous members have renewed and paid a subscription for the current year so that we remain on course to maintain a good reserve. The Trustees will review subscription levels again in the autumn.

During the year we moved our Financial and Membership records from spreadsheets to Beacon, a secure, GDPR compliant software system designed for u3as. I ran both spreadsheets and Beacon in parallel for the year, successfully, and now our records are only kept on Beacon. Many thanks to Anne Sharpley and Sarah Howell-Davies for their support during the transition and since.

The accounts have been scrutinised by an independent examiner with no direct links to D&D U3A, who has signed that they are satisfactory.

Verity Mosenthal
Dulwich & District U3A Treasurer
April 2021

Summary of Accounts for Dulwich & District U3A

Year ending 31 March 2021

	2020-2021		2019-2020	
<u>Receipts</u>	£	£	£	£
Subscriptions for 2020-2021	0.00		13,067.00	
Subscriptions in advance for next year	0.00		15.00	
Donations	0.00		10.00	
Gift Aid	2,594.36		2,838.98	
Savings account interest	4.58		18.48	
Christmas lunch deposits	0.00		1,580.00	
Interest groups for rooms, entry fee deposits, etc	0.00		911.50	
Misc (unpresented cheque)	0.00		5.00	
Pathfinder grant	75.00			
TOTAL RECEIPTS	2,673.94		18,445.96	
 <u>Payments</u>				
Room Hire		0.00		866.50
Postage & Stationery		237.59		1,563.22
Catering		0.00		1,293.78
Membership Subscription (Capitation)		2,380.00		2,271.50
Magazines		1,782.90		1,609.00
Gifts & Prizes		226.85		210.30
Open meeting expenses		100.00		70.00
Equipment		0.00		1,251.39
Publicity		114.00		142.97
Printing & distribution		2,808.40		1,845.65
Rosebery Lodge expenses/equipment		224.40		736.00
Conference and training		0.00		168.75
Christmas Lunch		0.00		1,953.90
Funding for new/expanding groups		0.00		396.03
Interest groups for rooms, entry fees, etc		0.00		735.00
Funding to enhance group activities		466.36		227.27
Zoom		716.18		
Sundries		239.24		23.38
TOTAL PAYMENTS		9,295.92		15,364.64
 Net of Receipts/Payments		 -£6,621.98		 £3,081.32

BANK RECONCILIATION

Cash funds as at 01/04/20	£24,190.09
Plus net of receipts/payments	-£6,621.98
Cash funds as at 31/03/21	£17,568.11
Barclays Community account	£7,488.58
Barclays Business Premium Account	£10,029.53
Petty Cash	£50.00
	£17,568.11