



## **Chairman's report 2024**

I am happy to report that in the last year we more or less broke even operationally, (see our Treasurer's report), despite continuing to pay for meeting rooms up until Christmas 2023; and our membership grew by six percent. At current rates we will reach 1000 members by 2028!

In my last year's report, I set out three areas which I thought would be key to progress in 2024: Volunteers, Reserves and Intra u3a Communication. This turned out to be prescient to the extent that these would be areas that consumed most of the Management Committee's (MC) time during the year. So, I will first address these one at a time. I am pleased to say that we have made significant progress with the first two of them - even though the road has been somewhat bumpy on occasions; the third was rather more intractable.

### **Last Year's Targets**

#### **Volunteers**

The most demanding issue was finding sufficient volunteers to help run the u3a Petersfield charity by serving on the MC. We tried to tackle the shortage of volunteers initially by communication with, and via, convenors as they are the persons who regularly see and have the opportunity to talk to, most members. This initiative produced some

ideas for the MC to explore but no actual volunteers. The MC then put out a direct appeal to all members with similar results. At a crisis committee meeting we concluded that, if we could not recruit several more members to the MC for the next year, then we would have no option but to wind up the u3a. I'm sure members are aware of the subsequent letter and emergency meeting.

The outcome was a strong and welcome response from a number of members and I'm very pleased to report here that we have now doubled the size of the MC. This should provide manageable workloads, an ability to resource new initiatives, and resilience in the event of any MC member or members being unable to fulfil their roles either temporarily or over a longer term. We also believe that we have identified members who may be prepared to join when current members' terms are up.

Whilst we can all be pleased at this outcome, the situation that gave rise to that crisis cannot be repeated in either the short or medium term. It is therefore important that we continue to work throughout our u3a on making volunteering an essential part of the culture, as it is fundamental to the u3a concept. I would stress that volunteering, particularly working in teams, is fun and can be a very rewarding part of membership.

A key factor in achieving this is that members who, for whatever reason, do not have one of the more obvious volunteer posts make a real effort to support those who do. This can take many forms; simply showing

appreciation, offering to run or help run their group's administration, or perhaps running a session or organising a trip. The opportunities are many. We are also reaching a size where a number of groups are full and developing significant waiting lists. We need to encourage a culture of helping new groups spin off and finding members willing to lead them. We will be looking at ways that all these things can be woven into the fabric of the u3a and I will refer to this again when setting out our main challenges for next year. The recent appointment of an MC member solely focussed on all aspects of volunteering is a great step in this direction.

## **Reserves**

The reserves policy, after some robust debate, has now been published. We arrived at a reasonable reserve which we conservatively set at a year's operating costs; this currently amounts to approximately £14,000. This leaves us about £14,000 in surplus funds. When it came down to it, the only feasible options were to do nothing or to reduce subscriptions for a period until the surplus was eroded. We chose the latter as this issue has been with us for a considerable period with no benefit to the u3a.

We will start to put this policy into effect next autumn by reducing subscriptions by £5. At the moment, it looks as though it will take several years to reach our target. We have built in an annual review to assess progress in reducing surplus funds so, if circumstances change, so can the policy.

## **Intra u3a Communication**

Communication between the different parts of our charity, particularly between groups and the MC still needs to be improved. As I alluded to earlier, the need for good two-way channels between the groups, via the convenors, and the MC should be self-evident, but for whatever historical reasons neither that recognition, nor the mechanisms, exist. Various attempts by the MC to find ways of bridging the gap have come to nothing so we have therefore grasped the opportunity to tackle this from a new convenor-led direction which is described in more detail in the Year Ahead below

## **Things to Celebrate**

Thus far this report has been rather mixed in terms of its message, but I do want to celebrate all the really excellent things that the members of this brilliant charity have achieved during the year.

Many established groups have gone from strength to strength and continue to provide huge enjoyment of an intellectual, physical and social nature. Groups have started up, notably the Film Interest Group, Pickleball 2, and a new German group. Open meetings have flourished, Arts and Heritage have run extremely successful trips, Science and Technology have been dabbling in the dark arts in Churcher's science labs and some outstanding speakers have addressed the Health Matters audiences. Many members have told me how good they think the general open meeting speakers have been and members have continued to enjoy visits to the Chichester Festival theatre. Marjorie

Day and her team continued to run coffee mornings providing a warm welcome to all, especially new members. The same team also masterminded a much-enjoyed Christmas party. Another team ran a highly successful volunteers and convenors "Thank You" event at the golf club.

All these things, and the many more I have not named, represent a huge investment in time and effort, on behalf of fellow members, by those leading groups and organising events, and those such as projectionists, tea teams etc. who support them. On behalf of the whole membership, I applaud you all.

I cannot complete this section without a tribute to my colleagues on the MC for whom this has been a particularly difficult and testing year. Jenny, Robina, Greg, Peter and Sandy, you stuck it out – hopefully easier times lie ahead.

### **Valediction**

I also need to pay tribute to four stalwarts of the u3a who are relinquishing their roles after years of outstanding service to Petersfield u3a:

- Robina Whitehorn our secretary and backbone of the MC, has been on the MC for five years and has been a huge help to me coming into my role from a standing start. She has taken the secretarial role through a lot of changes pushed through by the Charity Commission and the national u3a and digitalised our records. She retires at the end of her allotted stint.

- John Donlan has played a similar role as our webmaster providing a rock-solid base to all our IT support as well as being a tremendous contributor, at a national level, to the design and roll out of the new Site Builder website. He has certainly gone above and beyond in his commitment.
- Lynn Battersby-Vogt steps down as speaker secretary. She has come in for much praise over the quality of the speakers she has arranged, and will be a hard act to follow, and she goes with great thanks from us all
- Les Jarman long time Editor of Connect and former President – a legend in his own lifetime – finally retired. He had been looking for a successor for some time, but none was forthcoming. It was before my time but Les amongst many other things will be remembered for his pivotal role during the pandemic and the success over the years of Petersfield u3a will always be much to his credit

## **The Year Ahead**

Exciting times lie ahead. We have a number of new and enthusiastic MC members which has brought us to a level where we can hope to make real progress rather than just keeping the plates spinning. Organisations must evolve with the times and our u3a will not be any different.

We must all cope with the changing face of volunteering, in the same way that companies are trying to adapt to the needs of a modern workforce for flexibility. Here are some things we will be looking at:

### **Teams**

The MC are trying to work more and more in teams, which can be more responsive to the much less settled nature of domestic and working arrangements, to reduce commitments to meetings, to make the best use we can of the possibilities of the digital world. Teams can also make the roles more enjoyable. For some of us “old dogs and new tricks” comes to mind, but we try.

### **Reducing workload**

Working together to reduce workload. We need groups as much as possible to make our administration less labour-intensive. We have useful and much improved IT systems but we must keep the content up to date. This should not impose extra work on the convenor but rather be an opportunity for other group members to play their part. As well as save a lot of admin time for the MC and other volunteers, it will mean that new and prospective members will get accurate information about groups and will considerably advance our appeal to the outside world, one of the core u3a principles.

### **Looking to the future**

As the first of the Gen Xers start to join, we need to make sure that our offerings are geared for the future as well as the present. Quite where

this leads, I am not sure, but we need to ensure that the new generation is given its say in all areas of our u3a.

### **And Finally**

Groups are our u3a's lifeblood. Principal roles of the MC are to facilitate groups, making it easy for them to operate, and to manage the necessary administration, as well as to assure compliance with Charity Commission and Third Age Trust rules. To do this effectively it is crucial that leaders from all parts of our u3a (in particular group leaders and the MC) are working actively and effectively to support and communicate with each other. To put it bluntly this currently does not happen and as I have already mentioned MC efforts to kick start this process have failed.

Jenny Stevinson, a long-standing convenor and member of several groups, has volunteered to lead a project with the convenors to understand what is needed to make this process work for all sides. A huge thanks to Jenny for doing this. We hope to start implementing some of the recommendations in 2025.

### **Conclusion**

All in all, I think we are in good shape, though as I have already outlined there are plenty of things to do. For a whole variety of reasons there has recently been an unprecedented turnover of people in leading roles, so there will be a settling in period for the new team but, as always, the introduction of new faces brings new ideas and opportunities and we shall hope to grasp these with both hands.

On behalf of the MC I wish everyone another enjoyable year of u3a,  
Learning Laughing and Living.

Charles Price

November 2024