

**Petersfield u3a** (“Here you can age gracefully with an active U3A that organises trips and regular talks on more than 60 subjects, from supercomputing to impressionism.” Times - Friday March 21 2025)

## Chairman’s Report 2025

This is my valedictory report after three years, and at the end of the AGM I shall have immense pleasure in handing the reins to Jenny Thwaites who has been my unfailing support over times which have been largely good, if occasionally challenging, but never less than interesting.

I do not intend to try to cover the whole gamut of the year’s activities, but rather to pick on a few areas where significant change has been made or is in the process of being made and which are important for the future of this great organisation.

### A Summary of Activity

So a quick summary of the year is as follows. Groups met, new groups were formed, and this process has been ably covered in the new look Connect. Members continued to enjoy themselves with these groups and our open meetings and we should all thank those who spend a great deal of time and effort to make it all run smoothly. Membership continues to steadily grow despite our having had a three-year moratorium on any positive effort to encourage it whilst we put our own house in order to cope. We even had an unsolicited write up in the Times!

The highlight of the year was celebrating our 30<sup>th</sup> Anniversary, superbly organised by Bernice O’Reilly, Jenny Thwaites and their helpers. We got onto this rather late and drove Bernice mad as we changed our mind repeatedly about the format. That it worked so well was a huge testament to their organising skills and Bernice’s tenacity. So a big thank you there. After a rather tricky previous year it was great to throw a party, and there were a lot of compliments from those attending.

## Challenges in Running Petersfield u3a

Behind the scenes much has been going on. When I joined three years ago there had effectively been no new members of the Management Committee since 2019, and though there were several new members who had come in at the same time as myself, none stayed the course. In the meantime, a number of the longer serving cohort including the treasurer, the membership secretary and the secretary were all working their time out having done more than their fair share. This was clearly unsustainable and much of the past eighteen months has been about rebuilding the core administration and management of the organisation. Apart from the immediate effect of Covid we identified four areas which we felt were making recruitment and running the organisation virtually impossible. These were:

- The size of the organisation. We were trying to run with essentially the same structure that we had when we started despite more than doubling the numbers of members and groups, thereby heaping too much on individuals. As it became harder, less people were prepared to do it exacerbating the problem.
- We were taking too many decisions at the Management Committee level leading to too frequent and too long meetings.
- There was a fundamental lack of discourse between the Management Committee and Interest Groups (which are after all the point of the u3a), making it difficult to help us grow and move with the times, to start enough groups to satisfy the growth in the membership, and to generally help new and existing Groups Leaders with their roles. It was notable that other u3as, when we looked at their websites, virtually all had some format for regular meetings with convenors.
- There are generally acknowledged to be societal changes affecting the entire voluntary sector, which make finding those who can give the commitment much more difficult, and thus a more nuanced approach to using members' time more flexibly is needed.

We have therefore been seeking to do a number of things differently. Among the most important changes are

- Ensuring that around each activity area there is a team. We have successfully set up a Secretarial team, led by Rose Noonan an IT team headed by Tim Willans, an Editorial Connect Team led by Liz Wright and embryonic Recruitment and Website Editorial Teams. We are developing a significantly larger Groups team, and other MC members have members assisting them with their particular challenges.

- Where specific projects or activities arise, we have been looking for members who, whilst not seeking a permanent role, are happy to help with a particular event or project. We have become considerably better at finding helpers in these roles.
- Management Committee meetings have been reduced to bimonthly, and most activity and decision making is now done in small groups away from the formal environment. These combined with increasing our Committee's numbers to ten have made a great deal of difference.

These changes have meant that roles are more enjoyable and less time consuming. Furthermore, having more people involved spreads the word that this can be fun and rewarding, making it more likely that others will feel more comfortable about joining in.

## The Listening Project

In parallel with these changes to our volunteer base, we have been addressing the issue of the relationship between the u3a as an entity and its constituent groups. I mentioned in last year's report that Jenny Stevinson (Convenor of Gardening 2), had offered to run a project which in essence would listen to what help groups would look for our u3a to provide, what role groups collectively could play in helping our u3a, and what our u3a's communication routes should be to assist these objectives, once defined. This project has been going for a year thanks to enormous efforts on Jenny's part. Groups of Convenors or their stand-ins have met to discuss these issues and a consensus has formed in a number of areas.

The next step is to start addressing the [needs that have been identified?] and to find an appropriate regular forum for groups and the management team to drive this forward. The proof of the pudding will be in the eating and it is vital that progress is both made and seen to be made. This will be a key target for next year's committee.

The current view is that our 70+ interest groups will be organised into five "faculty" style hubs, each hub sharing something in common (for example, foreign languages). This has the added advantage that groups with common ground can gain from cross-fertilization of ideas. Each hubs' group leaders would meet regularly – current thinking is perhaps three times a year. There is a way to go to embed this approach and we are busy seeking to enhance our groups coordination team to resource this area.

In the meantime, a massive thank you to Jenny Stevinson who has persevered and got us to this stage. It has not been easy. We look forward to seeing the outputs start to appear and benefit Groups and the whole organisation in the next year.

There are two other areas I should like to touch upon briefly but will feature in next year's Agenda.

## Funds Surpluses and the Rules

We took a decision during the year to postpone for a year the decision to start running down our surplus funds. This was largely because, with an influx of new management committee members, we felt we were approaching a situation where we could consider managing larger projects if that was felt appropriate. Also, a very new Management Committee wanted the chance to see if we could use the money constructively.

At the same time, we have become aware that HMRC have been taking to task a number of u3as about where they are allowed to spend money for charitable purposes whilst claiming gift-aid. The following extract from the Finance quarterly bulletin from u3a nationally is I think self-explanatory, and we must see where that takes us before starting to take a different course.

*“Progress is still slow regarding our engagement with HMRC on their rejection of several u3a gift aid submissions and HMRC’s stance generally. After exchanging letters we have requested a face to face meeting and this is expected to happen sometime in June. In the meantime we can only recommend you continue to follow our guidance” on [the u3a website](#). (u3a Financial Quarterly)*

Our use of surplus funds is further complicated by the fact that, regardless of gift aid, the Charity Commission requires that charities spend on their charitable purpose in ways that individual member’s private benefit is only incidental.

I apologise to groups and members if we have been seen to be parsimonious whilst having a healthy bank balance. I can only say that the rules for how funds can be used are complicated and as clear as mud, and the last thing we want to do is second guess and land ourselves with a complicated argument with HMRC, or the Charity Commission. I have been there once in my life and, though we won, it was incredibly stressful and time consuming.

I know it is a priority for Jenny and next year’s committee to come up with a clear and understandable position on this so that Groups and members know where they stand. Unfortunately achieving this is at least partially in the hands of others.

## Communication

When I first joined the u3a and took up the Chairman’s role I struggled to get any sort of handle on the organisation. Effectively, it consisted of about 70 interest groups and several volunteer teams - but with no recognisable organisational structure. Quite a lot of the initial feedback from Jenny Stevinson’s listening groups reflected this too. It is

important that we find effective ways of communicating information and ideas. This is not only with our u3a but is also with the outside world for potential members as well as other u3as and third party organisations with which we may be able to join forces. This needs to be a priority in the next year. We have made starts in various areas but we would really like to form a team to pull all the bits together. Applications will be welcomed.

## And Finally

All in all, I think this has been a very positive year and I hope you will agree. For once we have managed to get a new chairman in place without any desperate pleas. Jenny Thwaites has been nominated to take over from me and has recorded a short video piece for the AGM.

Thanks to all in the u3a who have put up with me for the last three years and particularly for the support I have had from my fellow Committee Members particularly at times when life got a bit frantic. As you can see, I am leaving plenty of challenges for my successors, who I hope will find it as stimulating and rewarding as I have. Good luck!