

UPTON & LYTCHETT u3a

ANNUAL REPORT AGM 23 July 2025

Year 2024 - 2025

1. Introduction

At the start of the year we set a number of aims. Many of these have been achieved or are in the process of being achieved. This report gives an overview of the progress made against each objective and some of the challenges faced.

2. Our 2024/25 Objectives - Highlights and Challenges

- We started the year with a financial surplus which, in times of inflation is not a good use of members money. This has now been reduced as a result of introducing a more equitable fee structure and by providing our members with free talks and events during the year. We will start next year with a smaller reserve which we will set aside to cover any mid-year increases in venue costs or other contingencies.
- Our new fee structure, which was widely supported by the membership at the last AGM, has been successful. The implementation went smoothly and apart from a few members paying the incorrect amount the process went well. We will therefore continue the banding fee structure for the coming year.
- Membership fees are our only source of income so maintaining and increasing our membership is essential to everything we do. We set ourselves the aim of recruiting more members and developing our groups. I'm very pleased to report that we have achieved both.
- Charity Commission Registration. Paperwork for this has been completed and will be submitted prior to the end of the financial year.
- In 2024/25 we hoped to broaden the range of learning and social events we offer. This has proved challenging. Organising events is extremely time consuming, and we have reluctantly had to accept that within the capacity of our existing Committee we are unable to develop this area of work as we would have liked. Increasing venue and speaker fees are also making events more expensive.
- Our website has continued to be developed and now holds a lot more information. We encourage everyone to use it to keep up to date with current developments.
- During the past year we have also introduced a secure document storage system. This enables all members of the Committee to access all the information they need easily. A detailed Instruction Booklet on how to use the system has been written which new Committee members will find invaluable.
- Finally, our reciprocal membership arrangement with Purbeck u3a. This is gaining momentum and has resulted in more members joining both organisations. We plan to continue our reciprocal arrangement but over the coming year we will monitor the fee situation carefully to ensure equity.

3. Communicating with our Members

Our main method of communication with our members is through email. Whilst this works well for most people we recognise that for some of our members it presents difficulties. We know some experience problems either accessing emails or opening pdf attachments. When we are aware of difficulties we endeavour to find other ways of advising people of u3a issues and of informing them of what is going on. This may be by post or by hand delivering information but this takes time.

Building on the success of our enrolment Open Day last August, this year we have decided to adopt a slightly different approach by holding enrolment sessions in both Lytchett Matravers and Upton libraries. These drop-in sessions are for existing members and potential new members. Several Committee members will be on hand to assist people with enrolment, provide information about our groups, and answer any general questions you may have.

PLEASE NOTE THE DATE OF THE LYTCHETT MATRAVERS ENROLMENT SESSION HAS CHANGED FROM THAT PUBLISHED IN THE SUMMER NEWSLETTER.

**Tuesday 19th August 2-5pm - Lytchett Matravers Library, High Street,
Lytchett Matravers, BH16 6BG**

Wednesday 20th August 2-5pm - Upton Library, Corner House, Upton BH16 5PW

4. Welcoming New Members

Making new members feel welcome is important and something we try to do through our October coffee morning. This informal get together enables people to meet others new to our u3a as well as members of the Committee. It works well for people who join in September but those joining later in the year miss out. Next year, in addition to our coffee morning, we hope to develop more inclusive ways of welcoming and supporting new members.

5. Committee (Trustees) 2024-2025

The Committee for the past year:

Honorary Chair - Dawn Bason
Honorary Treasurer - Andy Jenkins
Honorary Secretary - Sharon Morgan
Honorary Vice Chair and IT Manager - Bob Newnham
Groups Coordinator - Gwyneth Harrop
New Enquiries Secretary & Minutes Secretary - Sarah Wall
Membership Secretary - Jacquie Bolson (part year) - Sharon Morgan (part year)
Social Secretary - Sheila Twelvetrees

Co-opted members:

Health & Safety Coordinator - Sarah Fleming
Publicity Manager - Martyn Colvey (part year)
Jacquie Bolson and Martyn Colvey resigned from the Committee part way through the year.

6. Committee for the coming year

At the AGM I will come to the end of my three year term as Chair. It has been a pleasure to be part of Upton and Lytchett u3a Committee. Through my role I have met many interesting and talented people, and I've learned what a valuable role u3a plays in many of our members lives. Although I will be stepping down as Chair, I will continue to support the Committee.

As I have mentioned on numerous occasions, recruiting new Committee members is one of our major challenges. For a year now, I and my fellow Committee members have sought replacements for the roles of Chair, Treasurer, Membership Secretary and Publicity Manager.

It's gratifying that our search for new Committee members has at last been successful, and for the coming year we will have three new members joining our Committee. Two of these, Sue Partridge, and Iain Dickie have worked with us before. We are delighted to welcome Sue back as our new Membership Secretary and Iain as our new Chair. The other new member is Bernadette Stonelake who will take over the role of Treasurer from Andy Jenkins after the AGM. We extend a warm welcome to Bernadette and thank both her, Sue and Iain for coming forward to join us.

We are now only short of one Committee member - a Publicity Manager. If you are interested in this role or know someone who you think may be suitable, please contact one of the Committee who will be happy to explain what's involved.

7. Special thanks

As we approach our AGM and our year-end draws near, my thanks must go to our current Committee without whom Upton and Lytchett would certainly not have such an active u3a. They all work tirelessly to ensure we remain viable. In addition, I must thank our Leaders who give up their time to run our many groups. Their ongoing commitment is very much appreciated. I would also like to thank the volunteers who help at our events and the members who bring along the food that we all enjoy.

My final word of appreciation goes to Andy Jenkins, who I would like to thank for doing such a superb job as Treasurer for the past five years. Andy has given up so much of her time and has put so much effort into ensuring our finances remain in a healthy position. We are extremely grateful to her for everything she has done for us, and we wish her and her family well for the future.

**Dawn Bason - Chair - Upton and Lytchett u3a
July 2025**

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