



Exeter U3A

Registered Charity Number 1104480

Annual Report and Accounts

1 April 2020 – 31 March 2021

Exeter U3A - Annual Report to Members

1 April 2020 – 31 March 2021

About us

Exeter U3A is an Unincorporated Members Association whose current governing document is the Constitution dated 26 February 2015. Our objects as set out in the constitution are:

- To advance the education of the public and in particular the education of older people no longer in full time gainful employment in Exeter and its surrounding locality.
- The provision of facilities for leisure time and recreational activities with the object of improving the conditions of life for the above persons in the interests of their social welfare.

We are planning to update our constitution at our Annual General Meeting on 22 April 2021 but our objects will remain substantially the same.

As a member of the Third Age Trust, we adhere to the principles of the u3a movement which is non-religious and non-political and has three main principles:

The Third Age Principle

- Membership of a u3a is open to all in their third age, which is defined not by a particular age but by a period in life in which full time employment has ceased.
- Members promote the values of lifelong learning and the positive attributes of belonging to a u3a.
- Members should do all they can to ensure that people wanting to join a u3a can do so.

The Self-help Learning Principle

- Members form interest groups covering as wide a range of topics and activities as they desire; by the members, for the members.
- No qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards.
- There is no distinction between the learners and the teachers; they are all u3a members.

The Mutual Aid Principle

- Each u3a is a mutual aid organisation, operationally independent but a member of The Third Age Trust, which requires adherence to the guiding principles of the u3a movement.
- No payments are made to members for services rendered to any u3a.
- Each u3a is self-funded with membership subscriptions and costs kept as low as possible.
- Outside financial assistance should only be sought if it does not imperil the integrity of the u3a movement.

Our Activities

The main activities we usually carry out to achieve our objectives are as follows:

- We hold general meetings on the fourth Thursday of the month which are free and open to all members. We invite speakers who give talks on a variety of interesting topics and we keep members up to date on developments in our u3a. There is also an opportunity for members to socialise over a cup of tea or coffee before the meeting starts.
- We form interest groups where members learn about a subject from each other or engage in social activities together.
- We have a project team who work with Exeter University. The University provides lectures for us and we get invited to take part in research projects.
- We produce a bi-monthly Newsletter which shows details of upcoming events, reports on recent group activities, communications from the committee and lots of contact details.
- We regularly meet with other u3as in Devon to exchange news, ideas and experiences.

During the year under review our physical activities have been somewhat curtailed due to the Coronavirus pandemic but we have moved to holding our monthly meetings by Zoom and many of our groups have continued to meet virtually where practical.

In planning all our activities, the Trustees keep in mind the Charity Commission's guidance on public benefit.

Chair's Report

Review of the year

The Coronavirus pandemic severely curtailed our activities when the mandatory lockdown on 23 March 2020 meant that we were no longer able to hold our large monthly gatherings or face to face group meetings. After a brief, initial period of inactivity many of our Group Convenors responded by moving on-line. Where possible many continued their activities using Zoom or other video-conferencing software or kept in touch via e-mail or WhatsApp.

The Trustees changed from meeting face to face every two months to meeting monthly using Zoom, to keep abreast of developments in the Coronavirus situation. We kept in touch with members through information in the bi-monthly Newsletter and also by publishing a separate communication to members in the months when there was no Newsletter. These were e-mailed to most members but sent out by post to those without e-mail and contained the latest Coronavirus guidance from the Third Age Trust. We took advantage of this period of relative inactivity to update our website and review our policies and procedures and update them where necessary. We also introduced a new closed Facebook group for Exeter U3A members to keep in touch and share information.

When restrictions were relaxed for a time in the summer some of our outdoor groups started to meet again with measures in place to control numbers and meet sanitisation and social distancing guidelines and some small groups met in

members' gardens. With guidance from the Third Age Trust, Risk Assessments for various group activities were prepared to help Convenors and Members understand the risks of operating during the pandemic. As a group our age profile makes us generally more susceptible to the virus so all members must make their own assessment of the risk involved to themselves and those they live with before deciding whether or not to take part in any u3a activity.

One casualty of the pandemic was the Annual General Meeting (AGM) which was due to be held in April 2020. This is the time that we would normally have presented our report to the members and held committee elections. We did consider holding the meeting by video-conference, e-mail or post or a combination of these but there was no enthusiasm amongst the membership for any of these and we therefore decided to follow the example of the National Trust and not hold an AGM at all in 2020/21.

A number of committee members were due to step down at the AGM and a few have done so but the remainder agreed to stay on until we hold our next AGM on 22 April 2021. We had hoped this would be able to take place physically but ongoing restrictions will not allow that so we will be holding it by Zoom. Members will have received all the relevant paperwork by e-mail (or by post for those without e-mail) including details of how to vote by post or electronically if they are unable or unwilling to attend the AGM by Zoom. Details of the current Trustees and those who served during the year under review can be seen later in this report.

The Trustees are very grateful for the many hours of work put in by all our volunteers this year including Group Coordinator and Convenors, Newsletter Editor, Website and Database Administrators and the University Liaison Team. Without their help Exeter U3A could not continue to operate and offer the wide range of activities that we do. Finally, as Chair, I would like to thank all the Committee members for all their hard work and support.

Looking to the future

The principal sources of funds for Exeter U3A are the annual membership fees and room hire contributions paid by those members. The age profile of our membership requires continuous recruitment just to maintain numbers. In previous years we have seen steady growth year on year but during the past year our membership numbers have fallen to around 540, largely due to the impact of Coronavirus. It is pleasing to see that around 500 of those members have renewed for 2021/22 but we need to do more to build our membership back up again.

We are planning to stage a recruitment drive around the National U3A Day which was originally scheduled for June 2020 then postponed to October 2020 and now pushed back again to June 2021. With coronavirus and social distancing likely to be with us for several more months at least we are looking at new ways to keep our activity groups going and to recruit new Trustees to the committee. It is only by attracting more members to join and getting more members involved in the committee that Exeter U3A will continue to thrive in the post coronavirus era.

Phil Slater

Group Coordinator's Report

At the beginning of March 2020 we had around seventy different groups offering a wide variety of indoor and outdoor activities. Although they all had to stop at the end of the month it didn't take long for many of our convenors to find new and innovative ways to keep going in the virtual world. Zoom was the most popular choice for many groups to restart meeting from the safety of their own homes but there were other ways too including Jitsi, WhatsApp and e-mail. Around one third of our groups managed to meet this way for all or most of the year.

Luckily the relaxation of some of the restrictions following the first lockdown coincided with the arrival of the warmer weather in late spring and summer. Some of the outdoor activities were able to start up again and some of the groups which had traditionally met indoors moved outside to meet up in gardens. The group numbers were limited and social distancing had to be observed but it was wonderful to get together again in person and around half of our groups took advantage of this for a few months in the summer.

The late autumn and winter saw increasingly tight restrictions which led ultimately to another lockdown in January and February. Outdoor meetings all stopped again and those that were able and willing went back to their virtual u3a world – but hopefully not for too much longer. With the vaccination roll-out going well across Devon and Boris's "Roadmap" now set out we can look forward to being able to get together again soon.

This pandemic has made us all realise the importance of social interaction and I would like to thank all those convenors who have worked tirelessly to keep their groups going physically or virtually or, where that has not been possible, will be working hard to get them going again soon.

Daphne Andrews

Speaker Secretary's Report

The initial lockdown in March 2020 put paid to our monthly meetings at the Mint and continuing restrictions meant that large in-person gatherings have not been able to resume. This regular feature of u3a life was missed by many so in the autumn we started holding the monthly meetings again but now by Zoom. It was wonderful to see so many of our members getting to grips with the new technology and we regularly had around 90 attendees.

We tried to help dispel the doom and gloom of winter weather and social distancing by offering a range of entertaining and uplifting presentations. In October Paul Robbins told us about some weird and wonderful characters in his talk on Great British Eccentrics and Rogues. November saw Robert Hesketh challenge us with a Devon themed Christmas Quiz - luckily you could still enjoy his beautiful photos even if you didn't know the answers to the questions. In celebration of the festive season, David Drury's presentation in December took us on a virtual flight around London to

see the dazzling light displays, Christmas trees and other decorations from the comfort of our own homes. In a cold, wet and windy January Brad Ashton lifted our spirits, regaling us with amusing tales about the stars he has worked with over a “Laughtime” of comedy script writing. Janet Cowlard returned to us in February with a very informative talk about Faberge and the Russian Royals, illustrated with some fantastic photos of many exquisite, bejewelled Easter eggs. Finally, in March, we were treated to a wonderful musical presentation from Roger Browne on a journey through The Great American Songbook featuring music from the 1920’s to 1950’s - George Gershwin, Cole Porter, Irving Berlin and more.

The Zoom system seems to be well worth the effort of organising each month, I would like to perhaps encourage more members to “give it a go”- nothing ventured, nothing gained!!

Looking forward to a more positive and active near future!!

Jan Rolfe

Newsletter Editor’s Report

As usual, there have been six newsletters produced in the year 2020/21, averaging 16 pages in length. This is a slight decrease which reflects the very changed circumstances Exeter U3A has faced since March 2020 with the drastic reduction in permitted social interaction due to lockdown restrictions.

This has been a challenging year for our u3a generally and for the Newsletter. With group meetings more or less banned apart from brief intervals when outdoor groups were permitted to meet, there has been a drastic reduction in group activities which has resulted in far fewer entries for the Group News section. It has also meant that there has been no need for the Forthcoming Events section which meant a reduction of five pages per issue.

Fearing that there would be no content for the Newsletter and nothing interesting for our members to read at a time when we needed to stay in touch with each other more than ever, a change in editorial policy was made and the call went out in the first months of lockdown for members to send me anything of interest. Our wonderful u3a members responded to the challenge with incredible enthusiasm, sending in photos, stories and poems, songs, interesting articles on a range of topics and they have continued to do this, despite the situation continuing for far longer than any of us envisaged. There is now a regular Members’ Miscellany section.

As editor, I am extremely grateful to all those who have sent in material, some of whom have become regular contributors. I know too that many members have really enjoyed the wide variety of content and are very appreciative of other members’ efforts. On a positive note, members’ contributions not only help fill a current shortage of content, but really make for a lively and interesting publication which showcases the wealth of talents and interests in our membership.

More than ever, I have been aware of how important the Newsletter is in helping our u3a maintain cohesion and enabling all members to feel involved. This is particularly important at the moment for those members who cannot or find it unsatisfactory to participate in virtual meetings; it is easy to feel left out and isolated.

Thanks to Anne Staley and Steph Ward for electronic and paper distribution respectively and, more than ever, thanks to group convenors and all members for sending me their news, features and photos. Please do continue to send me items for inclusion, not least as they will be needed for the foreseeable future until our groups and activities can resume some sort of normality.

Trudi Learmouth

University Liaison Team Report

Just as in every other aspects of our lives, this has been a strange year. Our main focus has of course been on keeping ourselves and others safe and healthy, so that for many members, Exeter U3A has had to take a back seat. Again, as in many other areas of life, events had to be cancelled. The Exeter U3A University Liaison Team had some wonderful talks planned for last year, which sadly could not take place.

However, that is not to say that nothing has been happening with our link. Members have been involved in research in a variety of areas, helping to support both academic staff and students.

Major intergenerational work was undertaken by several Exeter U3A members in a Shared Learning Project on the subject of Happiness with staff and students in the Department of Classics and Ancient History. It is planned that the 'toolkit' which came from this research will be disseminated more widely.

Professor Brian Rappert worked online with two groups of U3A members to further his research into 'The Magic of Social Life'. (The focus here was definitely on Magic, rather than on 'social life' which for most of us is non-existent.....)

There was also a chance to participate in a seminar on loneliness and in research connected to our emotional wellbeing. At the moment we are involved in work on Experiences of Ageing with a researcher at the Wellcome Centre for Cultures and Environments of Health.

In addition, there are more sessions this term of the very successful Conversation Café, which gives great support to our lonely international students. This term there have been 'Breakfast Cafes' and 'Teatime Cafes' – a great opportunity for both the larks and the owls amongst us!

The liaison team had a meeting recently – online of course! – to decide how to proceed in the coming months. Despite the obvious challenges, we were very reluctant to give up on all the hard work on the link with the University of Exeter, which started as far back as 2014. As it seems impossible to predict when members will want or be able to go up to the campus to join in a face-to-face lecture, we

decided to approach some of our contacts from last year to see if they would be willing to give their postponed talks via Zoom. We are delighted to say that we had some very positive responses and are hoping to give details of talks to be held in April and June.

We hope to send details to members on our database via our administrator, Helen Cleasby, when we have fuller information.

Carol McCullough

Membership Secretary's Report

I took over as Membership Secretary in April 2019. Then, we had a growing membership with 571 paid up members and a possible further 89 who had not renewed at the time of the AGM. By the end of that year, we had just under 700 members and then Covid hit. Many renewed early but by the time the rest were considering their renewal we experienced the first national lockdown. The committee gave members the option to postpone renewing until October when the reduced mid-year fee comes into effect. Some did, but in the end, 203 members elected not to renew and as at the end of the year neither had the remaining 93. This left the membership at the end of March 2021 very depleted with 539 members.

Despite the severe restrictions, members who have been in groups that have been able to function, have appreciated and valued this organisation and its ethos.

In recognition of the reduced activities, the committee gave a substantial discount for early-bird renewals during March this year.

The Third Age trust is designating 2 June 2021 as u3a Day to showcase the u3a as an organisation. Exeter U3A is planning to be involved in this by launching a new Facebook page and advertising in local press. We will also be holding a public event in the High Street later in the summer to promote the benefits of membership and hopefully attract some new local members. This event will incorporate our Groups Fair and contributions from members and groups.

Declining membership is a national phenomenon. In response, the Third Age Trust has rebranded itself and has dropped the word *university* from its title. In this difficult time with so much focus on mental wellbeing, it is hoped that we in Exeter can improve this for many more people.

For those of you interested in statistics, you may like to know that only 32% of you are male, 1% of you are associate members and 97% of you are on email.

Anne Staley

Treasurer's Report

Our income and expenditure for the year under review and the closing position at 31 March 2021 are set out in our accounts which follow this report, along with comparative figures for the previous year.

Our policy is to hold reserves at the year-end approximately equal to one year's normal expenditure. As the bulk of our membership income is received in advance but our expenses are spread over the course of the year this enables us to be sure we can pay our bills as they fall due. The effect of this policy in 2020/21 meant that many members renewed their membership as usual just before Coronavirus struck so we had a relatively healthy bank balance at the beginning of the year.

After the first lockdown was announced on 23 March 2020, and all of our activities ceased, some of the remaining members decided not to renew and as the year progressed, with varying levels of restrictions, it was difficult to attract new members. The resulting drop in membership income was more than compensated for by the saving on paid for venue fees as indoor activities were no longer possible.

Many groups moved to operating virtually where possible, some outdoor activities were able to take place during the warmer weather and we started monthly meetings by Zoom in the autumn. All of these activities were appreciated by members but we recognise that they do not represent the full u3a experience that we are all used to so we were pleased to be able to offer early renewal to existing members for 2021/22 at a significantly reduced rate.

Looking forward to 2021/22 it is difficult to forecast exactly when all our activities will be able to start again but with many members having already received the Coronavirus vaccine, we are hoping to be able to get together again soon. At the year-end we had £21,371 in the bank and so have plenty of reserves to cover paid for venue fees as soon as it is safe for us to return. We think regular face to face meetings will re-start in earnest around September 2021 and our budget for 2021/22 reflects this.

Keith Shaw

Trustees

The Trustees form the Executive Committee and are all Exeter U3A members who are usually elected or re-elected annually by the membership at the AGM for a term of one year. Trustees may be co-opted by the executive committee during the year to fill casual vacancies on the committee until the next AGM. Trustees who acted during the year from 1 April 2020 to 31 March 2021 and up to the date of approval of this report are shown below (with starting or finishing dates if they did not act for the whole period).

Trustee name	Office (if any)	Dates acted (if not for whole period)
Phil Slater	Chair	
Kay Matthews	Vice Chair	To 20/7/20
Keith Shaw	Treasurer	
Minna Egan	Secretary	
Anne Staley		
Jan Rolfe		
Ann Mitchell		To 11/5/20
Amanda James		To 11/5/20
Steph Ward		
Vivienne Watson		
Julia Crichton-Smith		From 20/7/20

Contact details

Charity's principal address

Whitehaven, 1A Stockton Avenue
Dawlish, Devon, EX7 9LU

Website

<https://u3asites.org.uk/exeter/contact>

The Trustees declare that they have approved the Trustees' report above.

Signed on behalf of the Trustees on 12 April 2021 by

Phil Slater – Chair

Minna Egan – Secretary

Exeter U3A – Receipts and Payments Accounts
1 April 2020 – 31 March 2021

Receipts and Payments	1 April 2020 to 31 March 2021	1 April 2019 to 31 March 2020
	£	£
Receipts		
Membership Fees	6,150	10,746
Paid for Venue Fees	1,598	3,516
Gift Aid Claimed	1,461	1,520
University Grants	0	1,600
Tea and Coffee Sales	0	193
Plant Sales	0	94
Donations	37	24
Other income	7	67
Total Receipts	9,253	17,760
Payments		
General room hire	0	1,431
Groups room hire	0	8,805
U3A National Membership	0	2,310
Third Age Matters Mailing	1,516	1,531
Beacon Database Licence	583	673
Convenors Lunch	0	505
Speaker Fees	383	395
Administration costs	405	186
Printing	640	302
University Liaison Expenses	10	60
Other Expenses	0	171
Total Payments	3,537	16,369
Net Receipts	5,716	1,391
Unrestricted cash funds last year end	15,655	14,264
Unrestricted cash funds this year end	21,371	15,655

Assets and Liabilities	At 31 March 2021 £	At 31 March 2020 £
Unrestricted cash funds		
Bank Current Account	17,969	12,243
Bank No2 Account	3,402	3,412
Total unrestricted cash funds	21,371	15,655
Other monetary assets		
Gift Aid outstanding to claim	748	1,342
Paid for Venue Fees receivable	0	1,522
Third Age Matters Mailing credit	203	0
Liabilities		
Stormpress re Newsletter Printing	0	126
Administration costs owing	0	20
Overpayments to be refunded	34	69
Room Hire fees outstanding	0	0

In addition to the monetary assets listed above Exeter U3A own a PC Projector and a display board which are several years old and have no significant monetary value.

The Trustees declare that they have approved the Receipts and Payments Accounts above.

Signed on behalf of the Trustees on 12 April 2021 by

Keith Shaw – Treasurer

Steph Ward – Committee Member