

Barnsley and District U3A: Chairman's Annual Report 2019

The growth of our U3A has continued at a pace over the last twelve months. At the end of our membership year in March, we had over 1170 members on our books, which reinforces the view that we are offering something valued by retired people in our area. It also recognises that our recently adopted outward-looking approach is paying dividends and increasing numbers of people are learning about the positive benefits of what we offer.

We understand that managing the expectations of our membership is a significant issue and the need for continuing development and extension of our activity portfolio is an ongoing process. Our recently created team of members who work together on the development of our groups seems to be working well and whilst a small number of our established groups have closed this year, it is reassuring to note that we have successfully launched a number of new activities in addition to duplicating some of our existing groups. One particular new group has received much publicity both locally and at Third Age Trust Level because of its unique nature. Walking Cricket is now part of our portfolio with two groups, each meeting on a fortnightly basis. We understand that these groups are the very first Walking Cricket Groups to meet anywhere in Yorkshire and the Groups' founder has been asked to advise on the activity at National U3A level.

Our relationship with Age UK [Barnsley] has also seen the continued realisation of mutual benefits and achievements, particularly with our involvement in the project aimed at reducing loneliness and isolation amongst retired people living in the Penistone area of the Borough and recently we have been asked to work with Age UK on a further, third year of this project. A number of new U3A groups are now well established in this area and regular monthly 'Drop In' meetings are continuing to take place to allow members living on the west side of town to keep up-to-date with BU3A news.

We continue to build on our multi-faceted approach to the way in which we publicise the U3A both within and outside of the organisation. Our website is now showing the benefits of the development carried out over recent years as we aim to ensure that we show the world a comprehensive picture of who we are and what we do. Our stock of publicity leaflets is constantly being updated and renewed as they are handed out at various venues around the borough. In recent months, we have been invited by a number of Council Wards to take part in their Health Awareness Fairs aimed at older residents. These invitations serve to confirm that the BU3A name is well understood and viewed positively by Council Officers. A recent contact from within the local Health Service has also led to BU3A posters being displayed in many of the area's GP Surgeries.

Our quarterly newsletter [The Buzz] continues to be a major asset both for our members and for others interested in finding out about us. Our more streamlined distribution process, which also involves our partners at Age UK [Barnsley], ensures that all our members are able to receive a copy of the Buzz in a timely and cost-efficient manner.

The BU3A Executive Committee remains a strong unit and despite some turn-over, most members who are not yet time limited have indicated their willingness to stand for re-election for a further period. All committee members have a specific portfolio with some having a team of members supporting them in their roles. As a group, the committee continues to bring a 'Can Do' philosophy to the table and our growth and vibrancy owes much to this team of individuals.

As can be seen from the financial statement, our finances remain strong and again we have been able to support the creation of new groups and a number of existing Groups have had help with capital expenditure on items over the last twelve months.

In terms of looking to the future, we need to ensure that we continue to manage our growth in a dynamic manner and that we constantly look to add to the list of activities which we offer to our members. The key messages about the self-help philosophy of the U3A movement and the constant ongoing need for volunteers in everything that we do will continue to be explained and reiterated to all our members both new and old. The decision last year to introduce a monthly 'New Members Link' meeting is proving to be very successful and enables us to try to ensure that new members understand that they have a potential role to play in volunteering to step forward in a lead or support capacity in some way or other.

A further issue that we are addressing is the need for succession planning to be managed in an effective manner, particularly within the Executive Committee, as a number of the key players are approaching the time limits of their periods of tenure. We are already witnessing the benefits of this planning with a couple of appointments expected to replace two long-term committee officers who are standing down imminently.

Whilst I have mentioned the contribution made by our Executive Committee members, I also need to mention our Travel, Social and Choir Committees, all of whom do tireless work on our behalf. Lastly, we all owe a great vote of thanks to those members who lead our groups. Without such people, there would be no Barnsley and District U3A. So, thanks to all our Coordinators and their deputies and all our members who contribute to our success story.

Alan Swann [Chairman, Barnsley and District U3A]

BARNSELEY AND DISTRICT U3A
Accounts Year Ending 31 March 2019

Registered Charity Number 1077654

INCOME	2018/19	2017/18	EXPENDITURE	2018/19	2017/18
Membership Subs	£11,161.21	£9,618.97	Room Hire	£30,477.32	£29,225.67
New Member Subs	£3,191.50	£3,224.40	Affiliation Fees	£3,454.50	£3,705.00
Blue Box Contributions	£25,823.08	£23,065.18	General Postage	£604.32	£239.36
Donations	£46.00	£85.50	General Printing	£443.27	£815.83
Gift Aid	£3,467.37	£1,348.98	Stationery	£802.25	£292.68
Monthly Raffle	£555.00	£986.00	Buzz Posting	£677.08	£386.94
Bank Interest	£51.15	£10.84	Buzz Printing	£3,987.50	£3,853.00
Stringalongs (Ringfenced)	£0.00	£130.00	Mobile Top-up	£10.00	£10.00
Easy Fundraising	£21.89	£16.60	CLA Licence Renewal	£279.98	£61.80
Advertising Revenue	£262.00	£192.00	Speaker Fees	£262.00	£19.20
Buzz Posting Contributions	£858.75	£457.00	Stringalongs (Ringfenced)	£215.49	£66.77
Third Age Magazine	£174.30	£108.20	Third Age Purchases	£321.94	£235.95
U3A Sales	£122.50	£112.50	Capital Purchases	£807.48	£1,066.90
Miscellaneous Gains	£152.50	£4.01	General Purchases	£1,010.67	£267.02
Spring School 2018/19	£3,310.00	£336.00	Miscellaneous Costs	£321.34	£324.98
Spring School 2019/20	£1,170.00	£0.00	Retirement Gifts	£0.00	£30.00
Social Committee (Ringfenced)	£120.00	£0.00	Committee Mileage	£0.00	£22.00
Old Blowers (Ringfenced)	£172.48	£0.00	Spring School 2018/19	£4,339.97	£0.00
Walking Football (Ringfenced)	£227.00	£0.00	Beacon Access Fee	£531.50	£0.00
			Social Committee (Ringfenced)	£0.00	£0.00
			Old Blowers (Ringfenced)	£0.00	£0.00
			Walking Football (Ringfenced)	£112.00	£0.00
General Income Total	£50,886.73	£39,696.18	General Expense Total	£48,658.61	£40,623.10
Christmas Lunch	£2,751.00	£3,256.00	Christmas Lunch	£2,637.50	£3,022.50
Christmas Lunch Raffle	£0.00	£120.00	Dec Meeting	£73.57	£125.00
Ceilidh	£0.00	£187.00	Race Night	£288.00	£200.00
Race Night	£585.10	£380.95	Burns Night 2018/19	£1,850.65	£2,729.05
Burns Night 2017/18	£0.00	£2,750.00	Burns Night 2019/20	£100.00	£0.00
Burns Night 2018/19	£1,902.00	£0.00	60s Night	£114.40	£0.00
60s Night	£1,080.00	£0.00			
Social Income Totals	£6,318.10	£6,693.95	Social Expense Total	£5,064.12	£6,076.55
			Less Unpresented Cheques	£0.00	£1,104.00
INCOME - FINAL TOTAL	£57,204.83	£46,390.13	EXPENSES - FINAL TOTAL	£53,722.73	£45,595.65
CASH & RESERVES					
Current Account C/F	£10,759.39	£7,277.29			
Less Unpresented Cheques	£0.00	£1,104.00			
Renewal Float (Cash)	£100.00	£150.00			
Deposit Account	£22,506.52	£22,399.24			
Choir Account	£1,638.42	£1,074.10			
Choir Cash in Hand	£177.30	£239.01			
TOTAL	£35,181.63	£30,035.64			

In accordance with instructions we have examined the books and records maintained by the treasurer.

The accounts give a fair and true view of the state of affairs.

Name: Leslie Roberts
Signature: [Signature]
Date: 20.4.19

Name: DON SMITH
Signature: [Signature]
Date: 20.4.19

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