

U3A GROUP LEADER MEETING

CHARIS CENTRE CRAWLEY

27TH March 2026

Attendees:

Trustees: Graham Friday (GF), Tricia Newell (TN), John Williams (JW), Kim Robinson (KR),

Group Leaders

Ann Achucarro, Wendy Adams, Carol Allen, Jean Austin, Isabel Baker, Peter Beckley, Maggie Berrill, Maureen Bufton, Peter Campbell, Gill Cooban, Julie Darlington, David Devere, Trevor Duffy, Pat Gedge, Kathy Jameson, Teresa Jasper, Phil Light, Jean Manuel, Bryan Kiely, Jim McGough, Jacqui Mercer, Sue Mearns, Clive Morris, Janet Newson, Susan Parker, Monique Tovey-Mansfield, Phil Vandenberg, Bob Weddell, Carolyn Wadley and Maureen Wicks.

Apologies from

Brenda Ashenden, Andy Bridge, Julie Bridge, Craig Edwards, Linda Edwards, John Hilder, Kitty Jenkinson, Margaret Lloyd, Julie Neale, Gill Pettitt, Dave Rawlings, Liz Tennant, Pam Watson, and John Wynter.

Notes taken by: Marie-Christine Clarke

Welcome and Introduction

TN welcomed everyone and introduced herself and what she wants to achieve as the new Chair.

PART ONE (FEEDBACK/UPDATES)

Third Age Trust – update

GF provide an update on what was happening with the Trust, this included:

- Reminder that the new Council structure was now operational, with u3as now having a stronger voice in setting the objectives and direction of the movement.
- Capitation fee for next year would remain at £4, but the cost of the Magazine would be going up to £4.50.
- The Trust has launched a new “Digital Strategy” which aims to provide a more secure and robust offering to u3a’s in terms of information and technological support. This will include the replacement of Beacon. Over the next few months u3as will be given the opportunity to contribute into this.

Action: GLs to provide the Treasurer with their thoughts, by the end of April, about what they would like to see in a replacement Beacon, so he can collate them and feed them back to the Trust.

Finance Update

GF then provided an update on financial issues.

- First term's activity report had been circulated in January. The key point highlighted in the report was that despite Group Activities overall being sustainable, there were a few Groups where there was the need for additional support to be provided to help them improve their attendance levels.
- Membership was now up to 695, an increase of 14% since September.
- The Organisation was now incurring Bank Charges. GF said that this was a national issue, with more Banks introducing charges to voluntary and charitable organisations. The purpose was to reduce the Banks overhead costs, by encouraging more use of electronic banking facilities.

GF said that it was difficult to estimate the cost impact, but on a worst-case scenario could be up to £13k but was more likely to be around £5k. The full impact of the charges will not impact until 2027, as we have been given an 86% discount for the first year ending November 2026. The largest element of the costs will come from banking cheques.

A constructive discussion then took place over the impacts of this on the way the u3a operates. The general conclusions were.

- Given the age profile of the membership, there would be significant issues, if we try to move totally to electronic transactions.
- Cheques were an effective and efficient way of managing Trips.
- To trial the use of online payments and card machines in Groups.
- To review the use of an alternative Bank.

There was a consensus, that the u3a will not be able to avoid Bank Charges, but would look to find ways to minimise them.

Action:

Treasurer to work with the GLs from OA7 and one room-based group to trial online payments and card machines.

Treasurer and the Membership team to look at ways to encourage the Membership to pay annual renewal by Bank transfer.

Trustee team to review Banking Arrangement.

PART TWO (GENERAL DISCUSSIONS)

Risk Assessments

There was a discussion on the need for all groups to undertake and document Risk Assessments for all activities, as there had been a few incidences in the last year of members being injured whilst undertaking u3a activities.

GF reaffirmed that Risk Assessments were an insurance requirement, but that they did not need to be complex.

It was pointed out that the link on our website would take GLs to some example Assessments provided by the Third Age Trust.

GLs that had experience of writing Assessments said they were happy to share them.

Group Support

The request for volunteers made by the Trustee team, in the March Newsletter, had been successful in attracting two new Trustees.

The Trustees were also concerned of another significant risk in terms of supporting Group Activities; with a substantial proportion of that support resting on Peter B's shoulders. So, there was an urgent need to find more volunteers to help Peter and spread the workload.

In addition, there were some tasks that need to be undertaken, which Peter does not cover. These include:

- Working with Groups to develop themselves, with the objective of increasing attendance levels.
- Developing ideas for new Groups.
- Editing and maintaining the Group Leaders Handbook.

There were a lot of Members, especially new ones, who go straight into activities and therefore may not be aware of the support need. The GLs were asked to have a look within their group to see if they could identify anyone, who could take on some support tasks.

Action: GLs to consider whether there were any Members in their group that may be able to take on some of the supporting tasks. If anyone was identified, then the GL should pass that information to the Trustees.