

Members' Meeting to Approve Fees for 2026/27

Friday 10th July, 14.00 to 14.30pm at the Friary Hall, Haslett Avenue, Crawley

Dear Crawley u3a Member,

Under our constitution the Trustees (Committee) are required to seek approval from a general meeting of the membership regarding any changes that they would like to make to the annual membership fee.

The purpose of this meeting is to seek support from the Membership for a £1 increase in the annual membership fee, taking it from £14 to £15 per year.

| | |
|-------|--|
| 14.00 | Welcome from the Chair, Tricia Newell |
| 14.05 | Treasurer, Graham Friday, to present proposal, and answer questions. |
| 14.15 | Opportunity for members with alternative fee proposals to state their case with the Chair to ensure these proposals are properly debated |
| 14.25 | Voting (if required) |
| 14.30 | Chair summing-up/closure |

A full set of supporting papers setting out and explaining the proposed increase is set out on the following pages. These will also be placed on the Crawley u3a website on the Documents page.

Members can submit an alternative proposal. The proposal and supporting document, should be submitted in writing to the Secretary at Secretary@crawleyu3a.org.uk by the 2nd July 2026, for distribution to the membership.

To help us deal with questions as fully as possible please submit them in advance by sending them to the Secretary at Secretary@crawleyu3a.org.uk

Proposal for increase in annual membership fee for the year 2026/27

The Trustees are making the following recommendation:

The Annual Management Fee for 2026/27 to be increased by £1 from £14 to £15.

Should this recommendation not be approved, then the fee will remain at the current level.

When making this recommendation the Trustees have taken the following factors into their deliberations.

Approach /Strategy

The Trustees have agreed to continue with the strategy established in 2024, when the following basis of setting future levels of the membership fee was set.

'The financial management of allocated budgets is difficult to deliver when there is uncertainty over whether plans can be delivered and the allocation of costs to match those budgets is arbitrary. This reduces their effectiveness as a management tool. So, the costing of a detailed programme of planned events is not cost effective in terms of the resources it consumes.

The nature of a lot of the costs being incurred are variable and likely to change, pending on the actions of the membership and activities being undertaken, which change from year to year.

The new approach will be to set the fee, based on the current cost basis, plus inflation. With the costs of future new initiatives and developments being initially funded from reserves, before being incorporated into the Fee calculation once they have become an established annual feature.'

Costs

Annex 1 sets out a statement of the costs and relevant income that the Trustees believe will be incurred during 2026/27.

The following factors were considered in formulation these figures.

- General price increases will be in the region of 5.0%, when the full impact of the war in the Middle East, works their way through. This would impact us through increased venue hire.
- The full cost of running the Office has been included for the first time.
- There is no change to the current programme and arrangements for the monthly meetings, coffee mornings, Group Leaders meetings, Xmas Party or AGM.
- Bank Charges have been included for the first time. The Trustees are seeking to minimise these, but it will be impossible to avoid them altogether.

Membership numbers

The assumption made on the number of members that will pay the Fee in 2026/27, is a key element in determining what the level of the fee needs to be.

The membership currently stands at just over 700, a significant increase from the 634 registered in August 2025.

The Trustees worked on a range of three options.

Option A – 650, worst-case position assuming we continue to have the annual turnover of members and fail to recruit new members to replace them.

Option B – 700, assumes we retain the current level of membership.

Option C – 750, assumes that the current level of recruitment continues for another year.

Fee determination

To set the level of the Membership fee to cover the estimated costs. The following table shows a range of potential fee levels, dependent on different membership levels.

| | A | B | C |
|--------------------------------|----------|----------|----------|
| Estimated 'Net' spend for year | £8,588 | £8,588 | £8,588 |
| Estimates of Membership number | 650 | 700 | 750 |
| Cost per member | £13 | £12 | £11 |
| Plus TAT capitation | £4 | £4 | £4 |
| Membership Fee | £17 | £16 | £15 |

Level of Reserves

At the beginning of this financial year the reserves available to support the general operations of the u3a stood at £17,128. The current financial projections for this year, indicate that we will broadly break even. So, a similar amount is still available for 2026/27.

The Trustees are looking at the need to repeat the successful 'Ruby Celebration' event with a similar celebratory event on a bi-annual basis, with the next one in 2027. Under the above strategy, the cost of this event will therefore be funded directly from the reserves. The cost of last year event was around £3,400.

The Trustees considered whether to retain the fee at the current level but also considered the risk of setting the organisation on a pathway toward the "cliff face" effect at some point in the future. The "cliff face" effect is where an organisation has not kept its fee and charges broadly in line with increases in its cost base, with the objective of using up its reserves. Then when the reserves run out the organisation is looking at a potential substantial increase in its fees, with uncertain impacts and risks on how that increase will be received.

Historic Fee levels

The following table reflects the levels of the membership fee over the past five years since fully restarting following Covid.

| | 2022/23 | 2023/24 | 2024/25 | 2025/26 | 2026/27 |
|-----------------|----------------|----------------|----------------|----------------|----------------|
| u3a requirement | £12.10 | £12.00 | £10.00 | £10.00 | £11.00 |
| TAT Levy | £4.40 | £4.00 | £4.00 | £4.00 | £4.00 |
| | £16.50 | £16.00 | £14.00 | £14.00 | £15.00 |

Statement of estimated net cost for 2026/27

| Comparative actuals for 2024/25 | | Anticipated income and spend in 2026/27 |
|---------------------------------------|--|--|
| £ | | £ |
| 568 | Trustee Team | 809.00 |
| 588 | Office | 2,740.00 |
| | Bank Charges | 800.00 |
| 803 | IT Licences | 1,013.00 |
| 0 | Health & Safety equipment | 100.00 |
| 69 | General operating licences | 85.00 |
| | Communications | |
| 590 | Newsletter | 440.00 |
| 264 | Publicity | 66.00 |
| | Events & Meetings | |
| 1,687 | Monthly meetings | 2,190.00 |
| 164 | AGM | 120.00 |
| 245 | Coffee Mornings | 270.00 |
| 214 | Really Useful Group | 150.00 |
| 342 | Group Leaders | 550.00 |
| 147 | General refreshments | 55.00 |
| 1,841 | Christmas Party | 800.00 |
| 3,416 | Celebration event / Open Day | 0.00 |
| 435 | Membership and Welfare | 700.00 |
| | Total Expenses | 10,888.00 |
| | Gift Aid | 1,500.00 |
| | Interest received | 800.00 |
| | | 2,300.00 |
| | Estimated net spending for year | 8,588.00 |