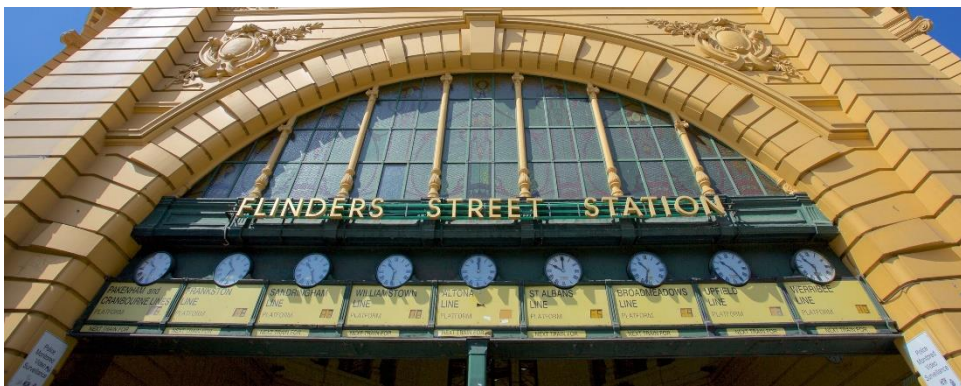




Annual Report 2022



Since 1985, Australia's first University of the Third Age and a member of the global U3A Network

U3A Melbourne City acknowledges the Wurundjeri Woi-Wurrung people of the Kulin nation as the traditional owners of the land on which we operate. We pay our respects to their Elders, past, present and emerging.

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What are we about?

U3A Melbourne City provides accessible, lifelong learning and physical and social activities for the wellbeing of retired and semi-retired people in inner Melbourne.

President's Report

We were delighted to return to something like a normal year in 2022 following the challenges of the pandemic. Even though we had to take precautions in Term1 due to Omicron, face-to-face classes progressively resumed as the year proceeded. Nonetheless, many tutors continued to rely on Zoom both as a precaution against infection spreading but also because they had become rather used to it.

Our membership numbers suffered during the pandemic falling from over 1300 to just 1000 in 2021. But we are on the way to recovery. By the end of September, we had over 1100 members and during 2022 we have had the largest number of new members (230+) in several years. Our decision to offer a discounted midyear joining fee greatly contributed to this influx.

Also contributing to our growth has been work done by Sharon Carter, our Marketing group leader, to leverage the power of social media in getting the word out to prospective new members. To support this, we have been analysing what most attracts our members within our overall offering. It won't be a surprise to learn that 26% of our members are enrolled in a foreign language and that 68% are enrolled in one or more Let's Do activity.

We have been able to return to a range of previously suspended face-to-events including a very well attended NAIDOC Celebration Day workshop developed by Merilyn Harris and a Q&A with Fiona Patten MLC. As well, we could stage the long-deferred winter and spring lunches which were so well attended we added a third held in October.

We continue to be deeply appreciative of the exceptional dedication and enthusiasm of our core volunteers including our tutors, Let's Do leaders and Course Coordination and Admin teams.

As the year ends, we will have changes to some of our key volunteer roles. After many years **Lan Wang** is stepping down as e-Bulletin editor, **Jane Tulloch** is completing three years as Secretary and **Julienne Wight** will end her mammoth contribution as Course Coordinator. To all of these we say a very big thank you.

I want to end by acknowledging the **Committee of Management** for their hard work and support and for being such a delight to work with.

Russell Huntington
President

Treasurer's Report

Income and Expenditure Statement for the year ended 30 September 2022

	2021/22	2020/21
	\$	\$
Income		
Investment income	271	713
Membership Fees	81,840	97,495
Joining Fees		80
Patrons/Supporters	3,350	3,750
Donations	4,017	4,274
Grants	540	2,411
Sales of T-shirts		120
Total Income	90,018	108,842
Expenditure		
Office Rent	25,099	20,721
Classroom hire	44,711	10,597
Operating expenses	19,871	16,217
Member, volunteer & committee expenses	8,932	1,933
IT & Zoom expenses	3,015	4,321
Social activities	3,383	550
U3A Network membership fees	1,908	1,754
Total Expenditure	106,920	56,093
Net Surplus (Deficit)	(16,902)	52,749

Notes to the Financial Statements

The 2021/22 financial year resulted in a deficit of \$(16,902) against a budgeted deficit of (\$37,823), a more favourable position than anticipated. Income was reduced compared to the prior year, in the main due to discounted fees offered at the beginning of the enrolment period, and then again mid-year. Despite the reduction in fees received, membership increased by 7% from 1,033 in 2020/21 to 1,108 in 2021/22.

Expenditure increased substantially due to classroom hire costs incurred as face-to-face classes commenced in Term 1, although some Zoom classes continued. Increased operating expenses included the mail out of membership cards, marketing through social media to encourage new members and bank charges, Social activities included the cost of refreshments for forums held during the year and subsidies to the Spring and Winter lunches that could not be held in the prior year. Similarly, member, volunteer and committee costs included volunteer and tutor lunches that could not held in the prior year.

In summary, some of the cost increases, when compared to 2020/21, involved catch up expenses for face-to-face courses and social activities that were not possible due to the COVID lockdown over the previous two years.

We look forward to continued freedom during 2022/23 where more classes are available, membership increases and accumulated surpluses are reduced.

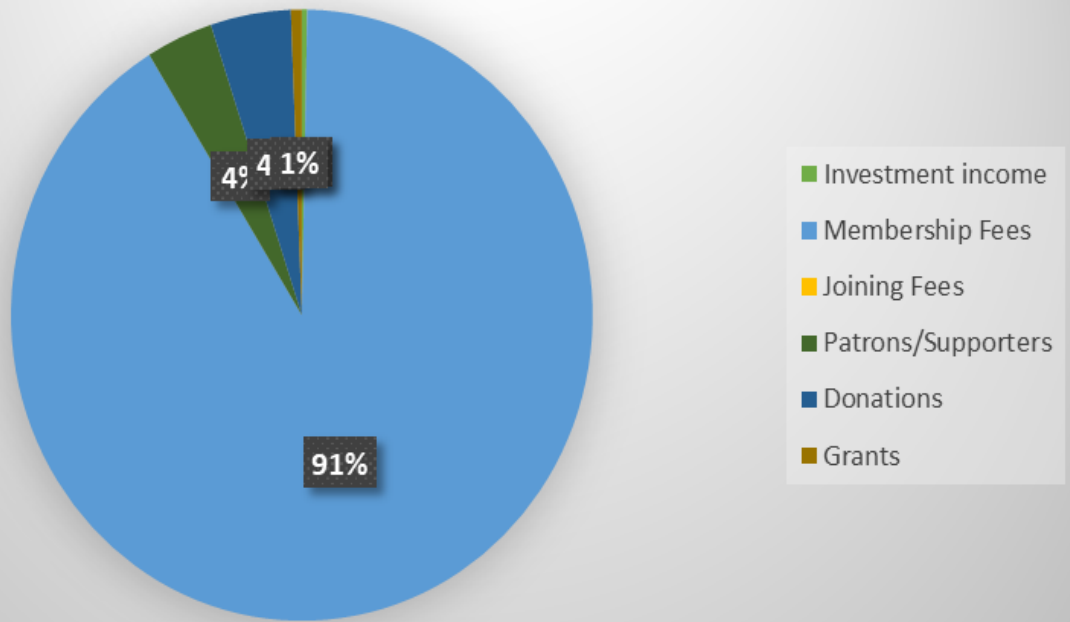
**Balance Sheet
as at 30 September 2022**

	2021/22	2020/21
	\$	\$
Current Assets		
Bank	47,359	187,009
Investments	231,099	100,590
Receivables	3,418	2,681
Total Current Assets	<u>281,876</u>	<u>290,280</u>
Total Assets	<u>281,876</u>	<u>290,280</u>
Current Liabilities		
Payables & Accruals	11,544	558
Funding in Advance	1,340	3,828
Total Current Liabilities	<u>12,884</u>	<u>4,386</u>
Total Liabilities	<u>12,884</u>	<u>4,386</u>
Net Assets	<u>268,992</u>	<u>285,894</u>
Members Equity		
Surplus for the Year	(16,902)	52,749
Members Equity	285,894	233,145
Total Members Equity	<u>268,992</u>	<u>285,894</u>

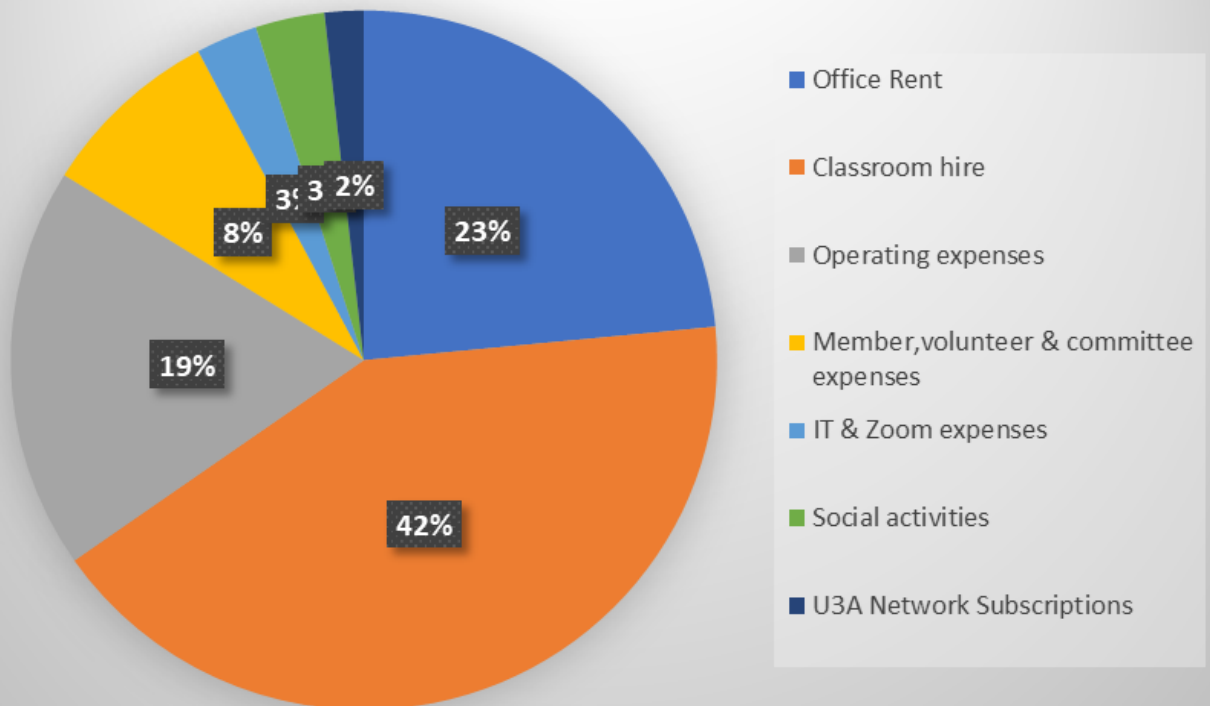
Certification

The Treasurer, Pauline Lomas, and President, Russell Huntington, being members of the Committee of Management U3A Melbourne City Inc., certify that the Financial Statements give a True and Fair view of the financial performance and position of U3A Melbourne City Inc. during and at the end of the financial year of the Incorporated Association for the year ending 30 September 2022.

Income 2021/22



Expenditure 2021/22



Volunteer Leaders

Over the past year many members have put up their hand to volunteer in leadership roles.

Committee of Management

Russell Huntington	President
Ann Johns	Vice-President
Jane Tulloch	Secretary
Pauline Lomas	Treasurer
Sharon Carter	Committee Member
Marilyn Harris	Committee Member
Peter Lawson	Committee Member
Kai Simpson	Committee Member
Julienne Wight	Committee Member
Paul Wilkinson	Committee Member

Other Leaders and Key Contributors

Julienne Wight	Course Coordinator
Paul Wilkinson	Let's Do Coordinator
Shelley Knight	Volunteer Co-ordinator
Kai Simpson	Administration Co-ordinator
Lan Wang	E-Bulletin Editor
Peter Lawson	IT Support Group Co-ordinator
Dorothy Maricic	Website Manager
Julie Nankervis	Life Member Liaison Co-ordinator

Courses Coordination

The Course Coordination team engage and liaise with new and existing Tutors to plan, develop and schedule a diverse program of yearly, semester and short courses.

While we have still faced challenges from COVID-19, this year has seen a gradual return to normal operations. We were only able to offer online courses in Term 1 due to the omicron surge, however more and more classes returned to face-to-face learning as the year progressed. Many members have said how pleased they were to be able to return to meet up with all their class members again. However, we are still offering online courses via Zoom for those who choose this option and will continue to do so in 2023. In 2022 we have offered approximately 90 yearlong and short courses via face-to-face and online modes.

In 2022, after having been in abeyance for a few years, we reinstated a course feedback process and are now able to offer our members the opportunity to provide feedback on their courses. This is helpful to tutors and gives our U3A the opportunity to refine and improve our course offerings. Thanks to Neil Rickards for all his work in setting this up and to all the members and tutors who have participated.

We owe an enormous debt of gratitude to our tutors and presenters who have continued to offer such a diverse range of high quality courses, despite the challenges. A cruise on the Yarra for tutors and Let's Do leaders was held in April 2022 to thank our tutors and group leaders for all their work and to give them the opportunity to meet and socialise again. We are holding an afternoon tea in November 2022 to wrap up the year. Thanks to Nene McWhirter for all her work with tutor recruitment and development and arranging the tutor events this year.

We have welcomed a number of new tutors in 2022 and we must say farewell to others. We say farewell and thanks to Betty Caldwell who has decided to retire from tutoring in 2023 after offering her Wednesday Writers course for 20 years. Tony Page finished up at the end of Term 1 2022 after offering 10 years of theatre and poetry courses. We thank Betty and Tony for their fantastic contributions to our U3A and offer them our very best wishes. For those tutors who are 'taking a break' in 2023 we thank you for your contributions and hope to see you again soon!

In team news we have recruited four new members to the team in 2023. They are Margi Breare, our new short course coordinator, Jude Harris, our new long course coordinator, Beverly Jenkin our room bookings coordinator and Diana Yu, who will provide general course coordination support. We also thank Karen Sharp and Shirley Arbuthnott for their work this year in room bookings and course coordination. I am stepping down as course coordinator in 2023 and wish to thank all at our U3A for their fellowship and support.

We also thank our partner venues around the City of Melbourne without whose support we wouldn't be able to present our course program.

Julienne Wight
Course Coordinator

Let's Do Program

Our Let's Do program remains the vehicle through which we accommodate much of the social and physical interests of our members. Our 16 Let's Dos include:

Let's Do	Leaders
Cycling	Tuesday – Paul Wilkinson, Neil Head Wednesday – Russell Huntington, Peter Lawson Thursday – Anne Irwin, Lan Wang
Drawing	Margot Sharman
Long Walks	Graham Ellis, Tania Winkels
Lunch	Jacci Moss
Movies	Tuesday – Jan Norman, Sharon Carter Friday – Katherine Wilson
Galleries	Sharon Carter, Margaret Wyatt
Music	Katherine Wilson
National Theatre Live	John Adams, Maureen Donegan
Opera on Screen	John Adams, Maureen Donegan
Theatre	Jacci Moss
Walks	Tuesday - Maybritt Vanolphen Friday – Julia Tompkins
Weekends	Jill Carr, Jacci Moss

Working Groups and Sub-committees

A number of working groups and sub-committees made important contributions during the year including:

Working Groups	Role	Members
COVID Safe Working Group	To ensure our resumption of face-to-face classes complies with government regulation	Ann Johns Julienne Wight Engchong Chua Russell Huntington Kai Simpson
Sub-committees		
Executive	To deal with urgent and routine matters on behalf of the Committee of Management	Russell Huntington Ann Johns Jane Tulloch Pauline Lomas
Admin	To design and manage all enrolment and other administration processes and related member interactions	Kai Simpson Dawn Gibson Paul O'Brien John Ogilvie Neil Rickards
Technology	To advise the Committee of Management on the effective and efficient use of information technology and to support members in IT applications	Russell Huntington Peter Lawson Kai Simpson
Marketing	To design and deliver campaigns to attract and retain members	Merlyn Harris Sharon Carter Russell Huntington

Core Volunteers

Core volunteers regularly commit and contribute their time and effort to critical roles within our organisation. These volunteers ensure we remain compliant and functional. Examples are tutors, coordinators, Let's Do team leaders, office administrators, Committee of Management members and a range of other roles.

Alison Hindson, Andrew Ferguson, Angela Di Pasquale, Angela Moodie, Ann Johns, Ann Ng, Anna Jardon, Anne Irwin, Anthony Jones, Barbara Charge, Bernadette Murray, Betty Caldwell, Beverly Jenkin, Blair Cramer, Bob Krstic, Brenda Joyce, Brian Dargan, Bruno Zielke, Carmel Taylor, Carol Thompson, Charles Klassen, Chris Dargan, Colin Paterson, Darrell Reid, David McRae, David Nicholds, Dawn Gibson, Debbie Hay, Deborah Claydon, Deirdre Gillespie, Dennis Lee, Diana Bianciardi, Diane Roy, Don Just, Dorothy Maricic, Elaine Batchelder, Elizabeth Way, Elliot Gingold, Engchong Chua, Fiona Graham-Murray, Fran Sciarretta, Gillian Carr, Glen Harvey, Gloria Madrigales, Graham Ellis, Greg Mann, Gwen Nyman, Hana Kadera, Heather Lacey, Helen McCulloch, Helen Pettet, Hui-Chang Wang, Ian Mackay, Irena Klajn, Jacci Moss, Jack Foks, Jan Norman, Jan Norman, Jane Tulloch, Janet Strachan, Jean Fahey, Jenny Earle, Jenny Favaloro, Jill Thompson, Jo Bennett, Joan Kraut, John Adams, John Besley, John Hill, John Ogilvie, John Waldie, Jude Harris, Judi Appleby, Julia Tompkins, Julie Badger, Julie Mills, Julie Nankervis, Julianne Wight, Juliette Zeelander, Kai Simpson, Karen Dupleix, Karen Sharp, Katherine Wilson, Kiera Stevens, Kirsty Richards, Lan Wang, Li Phan, Liz Mullin, Lyn Mayer, Lynette Kalms, Marcus Wearne, Margaret Hoobin, Margaret Leversha, Margaret Rees, Margaret Styles, Margaret Wyatt, Margi Breare, Margot Sharman, Marianne Markovic, Marie Dobson, Marigene Larew, Marion Kostanski, Maureen Donegan, Maureen Fasterau, Maureen Garner, Maureen McBride, Max Nankervis, Max Warlond, May van Olphen, Mei Riera, Merylyn Harris, Michael Dorahy, Michael Finn, Michael McKay, Mike Dorahy, Mike Jackson, Neil Head, Neil Rickards, Nene Macwhirter, Nina McPherson, Pat Collins, Paul O'Brien, Paul Wilkinson, Pauline Lomas, Penelope Osawa, Penny Storey, Peter Chung, Peter Connell, Peter Gason, Peter Lawson, Peter Newbury, Ray Matters, Relma Hartley, Rob Hagan, Robin Blair, Ron Bennett, Russell Huntington, Sandra Joicey, Sharon Carter, Shelley Knight, Shirley Arbuthnott, Simon Jenkinson, Susan Graefe, Susie May, Tatiana Winkels, Terry Rickard, Thea Traianou, Toni Purdy, Tony Brotherton, Tony Georgeson, Tony Page, Wendy Davenport,

Life Membership

In October 2022 the Committee of Management has awarded life membership to the following in consideration of their outstanding contribution to our U3A.

Angela Moodie, Ray Matters, Darryl Reid

These join the existing life members:

John Besley, Marguerite Grynberg, Will Semler, Margaret Ledley, Ann Hewett, George Boag, Blair Cramer, Judy Eldred, Christina Hill, Juliette Zeelander, Dorothy Davis, Alma Kristensen, Betty Caldwell, Hilary Adair, Helena Ling, Peter Salmon, Jill Thompson, John Waldie, Rom Jagielski, Julie Nankervis, Rhonda Favalaro, Fran Sciarretta, Jack Foks, Tony Miles, Margaret Rees, Pat Collins, Margaret Smith, Max Worland.

In addition, Recognition of Service has been awarded to Francis Devlin-Glass.

The Patrons' Program

Sincere thanks and appreciation are expressed to all our patrons and supporters, who continue to make a generous and very valuable contribution to the ongoing sustainability and success of U3A Melbourne City. In addition to these members, U3A Melbourne City thanks all the many members who have made specific donations to our organisation.

(If your name has been omitted, we apologise. Please know that your contribution is very much valued and appreciated. These lists are accurate at the date of printing. To all those who have contributed after this date, thank you for your generosity.)

Ann Johns, Alan Loney, Alexander Duncan, Angela Kee, Anita Goulding, Anne Vaughan, Bernadette Thomson, Bob Krstic, Chitra Ramanadhan, Colleen Wood, Don Just, Georgina Fitzpatrick, Gwynneth Budge, Irena Klajn, Jane Hoye, Joan Beckwith, John Hill, Katherine Wilson, Keryn McGuinness, Kiera Stevens, Margaret Bowman, Margaret Smith, Marie Dermott, Marjorie Button, Maureen Garner, Marilyn Harris, Michael Hoye, Michael Lisle-Williams, Michael Moore, Nora Ruzzene, Pat Collins, Rhonda Pocknee, Robin Blair, Rosalie Smith, Rosemary Workman, Russell Huntington, Sheena Broughton, Sue Travers, Terry Freeman, Tina Thoresen