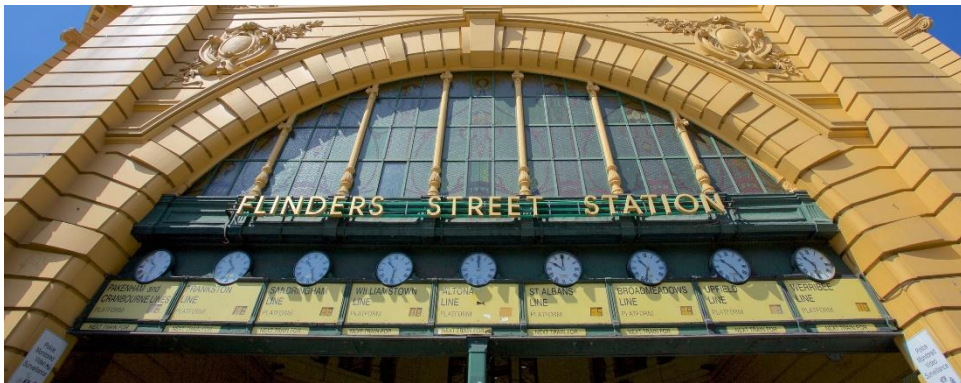




Annual Report 2023



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.

U3A Melbourne City Inc. ABN 84932435817 ACN A0045765C
Greek Cultural Centre, Suite 1 Level 5, 168 Lonsdale Street (cnr Russell St), Melbourne
3000

☎: (03) 9639 5209 ✉: office@u3amelbcity.org.au www.u3amelbcity.org.au

Index

President's Report	3
Treasurer's Report	4
Volunteer Leaders	7
Course Coordination	8
Let's Do	9
Volunteers	10
Life Membership	11
Patrons	11

What are we about?

U3A Melbourne City is the preeminent community for lifelong learning and social and physical activities for seniors in inner Melbourne

President's Report

2023 has seen a substantial recovery in our membership which in August had reached 1310, close to our membership immediately pre Covid (2019). This has been enabled by the attraction of over 365 new members, 66 of whom have joined since early June, taking advantage of our mid-year pro rata fee. Vice-President Sharon Carter, our Marketing group leader, has continued to leverage the power of social media to get the word out to prospective new members. As well as new member attraction, over 400 non-members have subscribed to our e-bulletin to keep abreast of what we are doing.

Our course offering has returned to pre-Covid levels with around 65 year-long courses and over 50 short courses. The new Course Coordination team led by Neil Rickards has settled in well.

We have over 20 Let's Do groups, an increase of five since 2022. Many new members appear to be joining to undertake Let's Do activities. Altogether 35% of our members participate in at least one Let's Do group.

One of the highlights of the year has been *Approaching the Voice*, the series of lectures presented by staff of the Faculty of Arts, University of Melbourne convened by the Dean. This was well attended by members and friends who appreciated the insights shared by the four lecturers. This series was conceived, pursued and organised by committee member Marilyn Harris, a truly exceptional achievement. We expect this initiative to be the beginning of an ongoing relationship with the University.

Our 140 volunteers give us 16,000 hours of their time each year. We continue to be deeply appreciative of the exceptional dedication and enthusiasm of our tutors, Let's Do leaders and Course Coordination, Admin and IT, website, e-bulletin teams. We are hoping that many of our 365+ new members will join their ranks.

The Committee of Management has adopted a strategic plan for the next three years which is anchored around four objectives:

1. To drive membership in a financially sustainable manner.
2. To build a strong brand identity.
3. To recruit and retain skilled tutors, Let's Do leaders and administrators.
4. To build community collaborations.

Finally, I want to acknowledge the exceptional work of the Committee of Management. All eleven members work hard collectively and with their respective group to enable us to provide quality services to members and to grow and develop.

Russell Huntington
President

**U3A Melbourne City Inc
Balance Sheet as at 30 September 2023**

	2022/23	2021/22
	\$	\$
Current Assets		
Bank	7,533	47,359
Investments	250,097	231,099
Receivables	<u>6,851</u>	<u>3,418</u>
Total Current Assets	<u>264,481</u>	<u>281,876</u>
Total Assets	<u>264,481</u>	<u>281,876</u>
 Current Liabilities		
Payables & Accruals	10,447	11,544
Funding in Advance	<u>1,265</u>	<u>1,340</u>
Total Current Liabilities	<u>11,712</u>	<u>12,884</u>
Total Liabilities	<u>11,712</u>	<u>12,884</u>
Net Assets	<u>252,769</u>	<u>268,992</u>
 Members Equity		
Surplus for the Year	(16,222)	(16,902)
Members Equity	<u>268,992</u>	<u>285,894</u>
Total Members Equity	<u>252,769</u>	<u>268,992</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 2023.

U3A Melbourne City Inc
Income and Expenditure Statement
for the year ended 30 September 2023

	2022/23	2021/22
	\$	\$
Income		
Investment income	6,333	271
Membership Fees	96,500	81,840
Patrons/Supporters	3,000	3,350
Donations	4,623	4,017
Grants	1,375	540
Total Income	<u>111,831</u>	<u>90,018</u>
Expenditure		
Office Rent	26,363	25,099
Classroom hire	71,219	44,711
Operating expenses	10,883	19,871
Member & volunteer ex- penses	11,433	8,932
IT & Zoom expenses	3,849	3,015
Social activities	1,967	3,383
U3A Network Subscriptions	2,340	1,908
Total Expenditure	<u>128,053</u>	<u>106,920</u>
Net Surplus (Deficit)	<u>(16,222)</u>	<u>(16,902)</u>

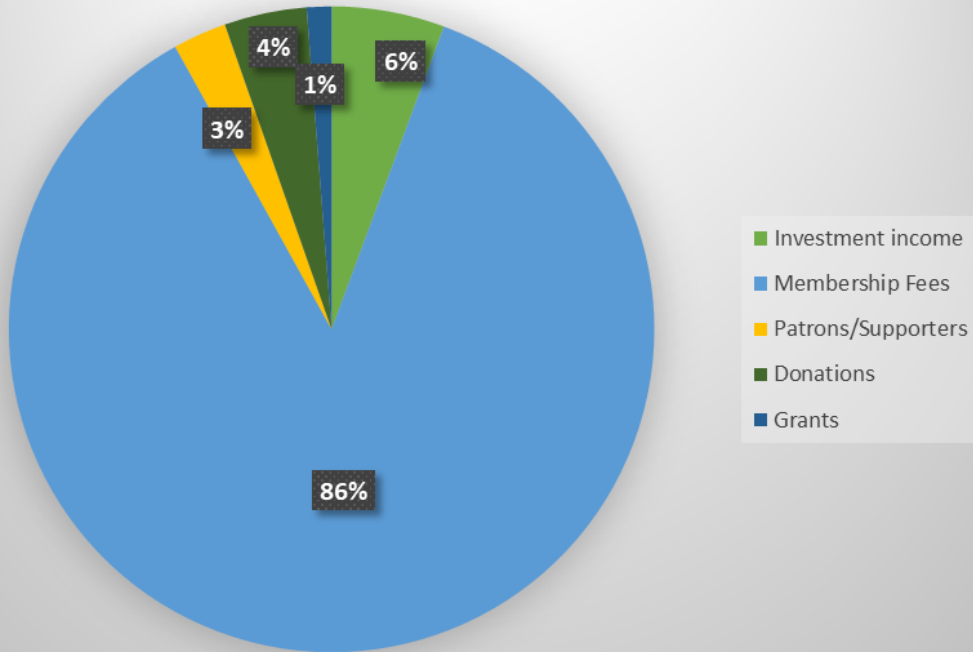
Notes to the Financial Statements

The result for 2022/23 financial year was a deficit of \$(16,222) which is a more favourable position than anticipated as the budgeted deficit was \$(24,099). Growth in revenue contributed to the reduced deficit as a result of increased membership fees of 18% when compared to 2021/22, and an uplift of interest rates on investments from 1% (and below) to 4.45%. Membership numbers increased by 16% from 1,108 in 2021/22 to 1,286 in 2022/23.

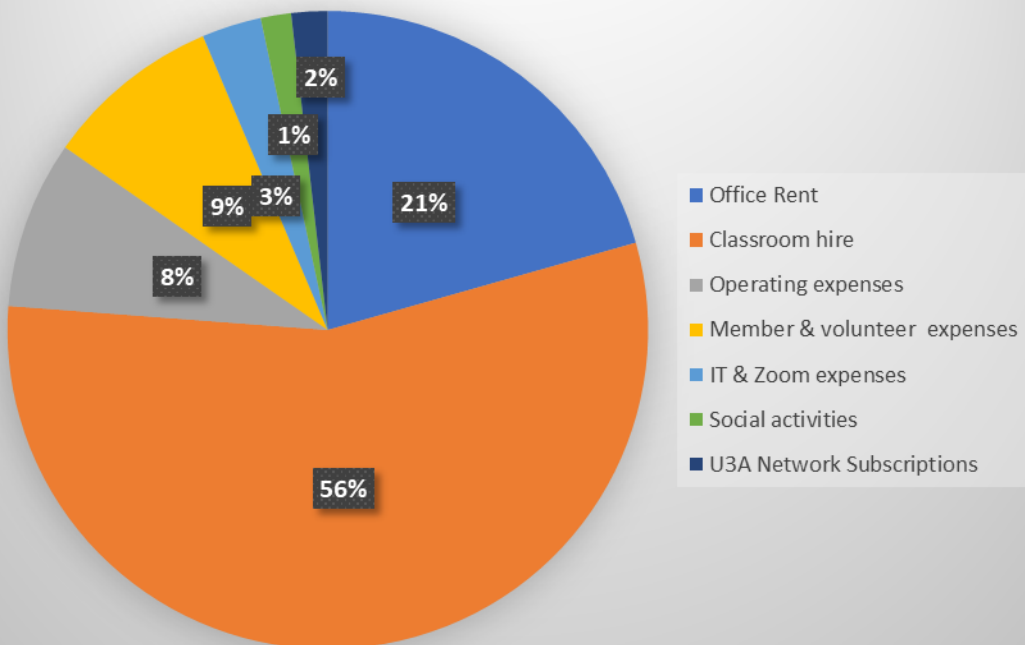
Expenditure increased by 20% due in the main to classroom hire costs incurred as courses reverted to face-face and the number of courses increased, offset against a reduction in general operating expenses. However, classroom hire costs remained well below the costs prior to COVID lockdowns in 2018/19. Other expenses included an increase in member and volunteer costs due to additional member and volunteer events and other membership related costs.

We look forward to another year of increased membership, varied and interesting courses and social activities, and a reduction in accumulated surpluses.

Income 2022/23



Expenditure 2022/23



Volunteer Leaders

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

Committee of Management

Russell Huntington	President
Sharon Carter	Vice-President
Kate McKenzie	Secretary
Pauline Lomas	Treasurer
Merilyn Harris	Committee Member
Ann Johns	Committee Member
Peter Lawson	Committee Member
Neil Rickards	Committee Member
Kai Simpson	Committee Member
Jane Tulloch	Committee Member
Paul Wilkinson	Committee Member

Other Leaders and Key Contributors

Administration Team	Kai Simpson, Dawn Gibson, Paul O'Brien John Ogilvie, Neil Rickards
Course Coordination team	Neil Rickards, Nene Macwhirter, Angelique D'Agostino, Margi Breare, Jacci Moss, Diana Yu
Let's Do Coordination	Paul Wilkinson
Accommodation Working Group	Deborah Claydon, Engchong Chua, Brenda Joyce
Social Co-ordination	Li Phan
E-Bulletin Editor	Margaret Styles
IT Support Group Co-ordination	Peter Lawson
Website Management	Dorothy Maricic, Robin Blair
Life Member Liaison	Julie Nankervis

Course 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.

Julienne Wight, the sole member of the course coordination team until early 2022 retired in December 2022 with a new team of 5 members replacing her. On behalf of U3A Melbourne City, I would like to thank Julienne for single-handedly providing courses for our members over the Covid years. We owe her an enormous debt of gratitude!

The current team of seven members have settled into an excellent working relationship. The team is made up of Russell Huntington (Chair), Nene Macwhirter (Tutor Mentor and Recruitment), Angelique D'Agostino (Year-Long Coordinator), Margi Breare (Short Course Coordinator), Jacci Moss (Venue Bookings), Diana Yu (General Support) and Neil Rickards (Quality Coordinator). We are still, though, on a learning curve and, as the tutors would know, making efficiency modifications to our procedures. These modifications included the recommendation and introduction by Angelique of new IT solutions. Thanks goes to all team members for their hard work and dedication.

This year we offered the full range of face-to-face classes plus a number of online classes via Zoom from the start. Many members have said how pleased they were to be able to return to meet up with all their class members again. In 2023 we have offered approximately 110 yearlong, semester and short courses via face-to-face and online modes. This is an increase of around 20 courses since last year. We hope to add more in 2024 to cater for our increased membership.

The course feedback process continued this year but under a new policy where new courses and new tutors are surveyed plus a three-year rotating survey of continuing courses with a third surveyed each year. This offers 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 goes to all the members and tutors who have participated with an average of a 58% response rate from members. This is much higher than any equivalent voluntary survey.

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. Two events were held during the year to thank all our tutors for all their work and to give them the opportunity to meet, socialise and put faces to names. We are holding an afternoon tea in October 2023 to wrap up the year. Thanks to Nene Macwhirter for all her work with tutor recruitment and development and arranging the tutor event this year. We have welcomed a number of new tutors in 2023 and we must say farewell to others. We say farewell and thanks to Pat Collins who will finish up at the end of this year after offering 13 years of mainly Mahjong courses. Anna Jardon will retire this year after offering 9 years of Italian courses. Paul O'Brien and Fiona Graham-Murray have decided to retire from tutoring in 2024 after offering respectively German and Movie Discussion courses for 8 years. We thank Pat, Anna, Fiona and Paul for their fantastic contributions to our U3A and offer them our very best wishes. Lynn Banna and Frankie Devlin are also retiring, and we thank them also for their contribution. For those tutors who are 'taking a break' in 2024, that being Marcia Katting and Ray Matters, we thank you for your contributions and hope to see you again soon!

Neil Rickards

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 20 Let's Do are:

Cycling	Monday – Anne Irwin Tuesday – Paul Wilkinson, Neil Head Wednesday – Russell Huntington, David de Crespigny Thursday – Lan Wang, Mei Regan
Drawing	Margot Sharman
Excursions	Graham Ellis, Tania Winkels
Long Walks	Silvia Grande
Movies	Tuesday - Sharon Carter, Jan Norman Friday – Katherine Wilson
Galleries / Museums	Sharon Carter, Margaret Wyatt, Kathy Dale
National Theatre Live	John Adams, Maureen Donegan
Opera on Screen	John Adams, Maureen Donegan
Theatre	Jacci Moss
Walks	Tuesday – Margaret Wyatt Friday – Julia Tompkins
Fast Walks	David Brook
Weekend Excursions	Jill Carr, Jacci Moss
Lawn Bowls	Tony Brotherton, Reg Martin
Photography	Lan Wang
Pub Lunch	Kate McKenzie, Pauline Lomas

Volunteers

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.

John Adams, Judy Appleby, Shirley Arbuthnott, Julie Badger, Lynn Banna, Elaine Batchelder, Jo Bennett, Ron Bennett, Loida Benns, Diana Bianciardi, Robin Blair, Margaret Breare, Lesley Bright, David Brook, Tony Brotherton, Lynne Broughton, Ian Burchell, Sue Burney, Gillian Carr, Sharon Carter, Barbara Charge, Susan Cherrey, Engchong Chua, Mirna Cicioni, Deborah Claydon, Pat Collins, Peter Connell, Nancy Corbett, Blair Cramer, Angelique D'Agostino, Kathy Dale, Brian Dargan, Chris Dargan, Wendy Davenport, David de Crespigny, Frances Devlin-Glass, Frankie Devlin, Angela Di Pasquale, Marie Dobson, Michael Dorahy, Jenny Earle, Graham Ellis, Jenny Favalaro, Andrew Ferguson, Michael Finn, Georgina Fitzpatrick, Jack Foks, Richard Gales, Maureen Garner, Peter Gason, Dawn Gibson, Giff Gifford, Deirdre Gillespie, Fiona Graham-Murray, Silvia Grande, Merilyn Harris, Glen Harvey, Neil Head, Wolf Heidecker, Christina Hill, John Hill, Alison Hindson, Margaret Hoobin, Russell Huntington, Anne Irwin, Mike Jackson, Anna Jardon, Beverly Jenkin, Ann Johns, Richard Johns, Richard Johnson, Sandra Joicey, Anthony Jones, Brenda Joyce, Don Just, Hana Kadera, Lynette Kalms, Marcia Katting, Irena Klajn, Charles Klassen, Joan Kraut, Bob Krstic, Marigene Larew, Margaret Leversha, Peter Lawson, Pauline Lomas, Merryn Lowe, Ian Mackay, Nene Macwhirter, Gloria Madrigales, Greg Mann, Ian Marchment, Dorothy Maricic, Marianne Markovic, Reg Martin, Ray Matters, Susie May, Maureen McBride, Helen McCulloch, David McGregor, Michael McKay, Kate McKenzie, Carol Miles, Mimi Millar, Mara Miller, Julie Mills, Angela Moodie, Jacci Moss, Liz Mullin, Tim Murray, Julie Nankervis, Peter Newbury, Ann Ng, David Nicholds, Janet Nicholds, Jan Norman, Gwen Nyman, Paul O'Brien, Andrea O'Donohue, John Ogilvie, Penelope Osawa, Colin Paterson, Helen Pettet, Yolanda Pettinato, Li-Yin Phan, Toni Purdy, Mei Regan, Darrell Reid, Neil Rickards, Mei Riera, Di Roy, Nobuko Sayer, Fran Sciaretta, Margot Sharman, Kai Simpson, Kiera Stevens, John Stone, Janet Strachan, Margaret Styles, Marita Taliana, Carmel Taylor, Julia Tompkins, Jane Tulloch, May van Olphen, John Waldie, Hui-Chang Wang, Mary Wark, Marcus Wearne, Paul Wilkinson, Katherine Wilson, Tatiana Winkels, Margaret Wyatt, Diana Yu, Natasha Zajc-Dalcourt

Life Membership & Recognition of Service

In October 2023 the Committee of Management awarded life membership to the following in consideration of their outstanding contribution to our U3A over ten years:

Elaine Batchelder, Ann Johns, Maureen McBride, Helen McCulloch, Ian Mackay, Julie Mills, Peter Newbury, Paul O'Brien, Kiera Stevens and Marcus Wearne.

They 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 Favaloro, Fran Sciarretta, Jack Foks, Tony Miles, Margaret Rees, Pat Collins, Margaret Smith, Max Worland, Angela Moodie, Ray Matters, Darrell Reid.

In addition, in May 2023 the Committee of Management agreed to award **Recognition of Service to Dawn Gibson, Marilyn Harris, Kai Simpson and Julienne Wight** to recognise their exceptional contribution over the past several years.

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