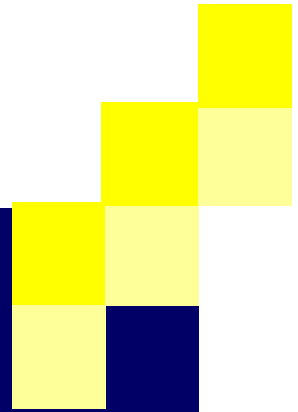


ANNUAL REPORT 2009-2010



President's Report

Highlights of the year:

- 25th Anniversary celebrations
- 92 courses delivered
- 12 new tutors recruited
- \$10,449 of grants awarded
- Strategic plan reviewed
- RMIT students produced a radio documentary
- Archives and history project commenced
- Course feedback policy introduced

“Our mission is to improve the quality of life and wellbeing of our members through contact and participation in academic, creative and social programs.”

After one year as President, I am awed by the enthusiasm and effort that goes into the growth and sustaining of this great organization. And we are just *one* of 96 U3As in Victoria! What an achievement, and what a tribute to the skills, knowledge, energy and dedication of us all in our retirement!

First and foremost I want to thank all those who work to sustain and progress our Melbourne City U3A – the Committee of Management, the Tutors, the workers in the office, and participants in the working parties – which include the Archives Working Group, the Promotions Working Party, the Funding Working Party, the Tutors' Working Party, and those who were involved in the organization of the Seniors Festival and Forums. If you look further in this Annual Report, you will see the list of names, and what an impressive list this is! Thank you all.

This year our membership has grown from the mid-800's to over 920 – the first growth we have seen in several years. Our move to make the Forums monthly has been very successful and will continue in

2011. We have reviewed and renewed our Strategic Plan for 2011-2013 – our roadmap for the next three years. The introduction of the Patrons' Program is part of our planning to stay self-sufficient financially.

We held the 25th Anniversary lunch in October with speaker Dr. Rick Swindell, who described characteristics of U3As today, and pointed out issues that U3As may need to address to stay relevant to today's retirees – not to mention the estimated dollar value of all our volunteer work! Colossal!

And the celebration at the Seniors Festival at Federation Square – our third appearance – was very successful. We also held a series of lectures during Seniors Week which were well attended by the general public as well as our members.

The groundwork for many of the things we would like to do in 2011 has taken place this year. We will introduce some of the U3A Online courses to diversify our range; we will continue to research the 'baby boomer' generation and its educational aspirations; we will try and become better



Jill Thompson, President

known amongst the growing retired resident population of the City of Melbourne. We will seek out partnerships with other groups and organizations and work to improve recognition by the City of Melbourne of our contribution to the learning and cultural life of the City.

Just a few challenges to see us through 2011!

Once again, my thanks to everyone who works so hard to make our U3A the great organization it is.

Jill Thompson
President





Our home—Ross House, Flinders Lane

“This generation does not necessarily see themselves as having entered old age, but prefers to see retirement as a time to reinvent themselves and explore new aspects of life.”
City of Melbourne, Lifelong Melbourne 2006-2016

“U3A courses have always been very informative and a great way to keep active brain-wise and physically. Great variety, and friendly social people.”
(Philosophy student)

Who we are

U3A Melbourne City Inc. is part of a world-wide movement of universities of the third age—self-help, voluntary organizations which promote active ageing and lifelong learning for the over 50s who are no longer

in full-time employment.

U3A Melbourne City was the first to be established in Australia following a public meeting in 1984.

It fulfils its mission by providing courses in a broad

range of disciplines, a lecture program on topical issues presented by guest speakers and opportunities to make new friends and extend social networks through its social and volunteer program.

Highlights

Grants

We successfully applied for and received

\$10,449

in competitive grants during this financial year.

Membership

We had

917 members as

at end September.

Tutors and Courses

We had **62**

volunteer tutors teaching

3,310

hours of classes. We offered

40 full-year courses and

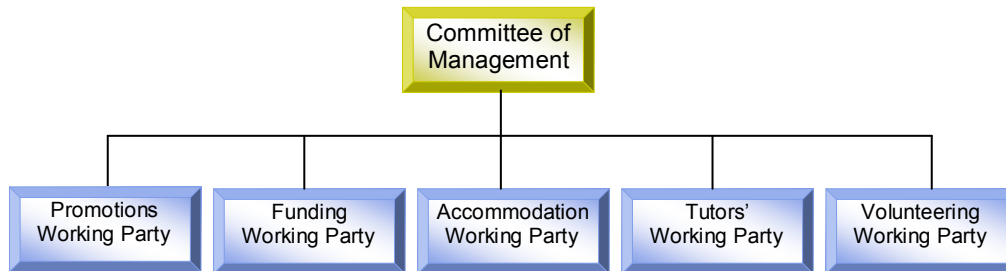
52 short courses throughout the year.

Organisational Achievements

- Reviewed the strategic plan
- Introduced the Patrons' Program
- Piloted and introduced a course feedback system
- Initiated discussions with the City of Melbourne
- Delivered a guest lecture program in conjunction with the City Library during Seniors Week 2010
- Increased our stock of teaching equipment through a grant from FAHCSIA
- Commenced work on a promotional DVD
- Initiated discussions with Victoria University regarding use of rooms and a research project on the retirement aspirations of baby boomers
- Introduced a policy on the wearing of ID cards to all U3A classes/events as part of a risk management strategy
- Submitted three grant applications for 2011
- Partnered with Sage Travel to lead a tour to the UK in 2011
- Commenced a project to record our history

Structure and Management

U3A Melbourne City is a not-for-profit incorporated association which commenced operation in 1985. Its management structure is shown below.



The Committee of Management is responsible for the performance of U3A Melbourne City and for guiding its strategic direction. The Committee, which met monthly, comprised four office bearers – President, Vice-President, Treasurer, Secretary – and ten ordinary members. The Committee farewellled John Shilliday, Merilyn Burt and Shirley Byron and welcomed Necia Burford and Shirley Mason as co-opted members. Committee membership during the year comprised:

Ms Jill Thompson, President
Mr John Shilliday, Vice-President
Ms Helena Ling, Secretary
Mr Jim Norton, Treasurer

Ms Diana Andrews, Member
 Mr George Boag, Member
 Ms Necia Burford, Member (co-opted)
 Ms Merilyn Burt, Member

Ms Shirley Byron, Member
 Ms Shirley Mason, (co-opted)
 Mr Robert May, Member
 Mr Tony Miles, Member
 Mr Peter Morgan, Member
 Ms Julie Nankervis, Member
 Ms Valerie Pincus, Member
 Dr Peter Salmon, Member
 Ms Nan Wingfield, Honorary Member



U3A Melbourne City
Chess class

“U3A gives us opportunities to practise our skills, share our knowledge, learn new things, and above all to meet and interact with new people.” (Member)

Professional Development and Networking

Committee members engaged in the following activities during 2010:

Jill Thompson and Tony Miles attended a workshop on U3A operational issues conducted by the U3A Eastern Metropolitan Forum.

Helena Ling attended a VCOSS Forum on Accessing Skilled Volunteers.

Peter Salmon successfully completed the Cert. IV in

Governance, a free initiative sponsored by the City of Melbourne.

Jill Thompson and Helena Ling consulted with U3A Manningham about their volunteer system.

Jill Thompson attended the U3A Queensland Network conference in Townsville in August.

Helena Ling attended a demonstration of the

membership database of U3A Knox.

Peter Salmon was our U3A Network representative during 2010.

Peter Salmon and Robert May attended a City of Melbourne community consultation on services for seniors

Shirley Mason attended a course on public speaking, offered by **Robert May**.



Ambassador for Ageing, Noeline Brown, presented a lecture during Seniors Week 2010

Forums and Events

The following lectures were conducted throughout the year:

Living longer, living stronger—Barry Durham

Seniors and new information technology—Jemma Wines

The grand old station is 100—Jenny Davies

Dealing with conflicting demands: searching for

my authentic life—Iola Mathews

What will Australian universities look like in 20 years—Professor Marcia Devlin, Deakin University

Australia's Refugee Policy under the Rudd

Government—Jessie Taylor

The U3A Choir and Music Ensemble gave a number of performances throughout the

year including at Federation Square for the opening of Seniors Week.

A lunch to celebrate our **25th Anniversary** was held at William Angliss Restaurant, with guest speaker Dr. Rick Swindell.

Volunteers' Christmas Lunch at the Multicultural Hub to celebrate the contribution and hard work of our volunteers.



Playing Mahjong at Federation Square—U3A Carnival of Learning

Community Consultations and Public Relations

During Seniors Week, in October, we participated in the U3A Carnival of Learning at Federation Square and offered a program of guest lectures to celebrate our 25th anniversary.

Dr. Peter Salmon represented U3A at the *Mind, Body and Soul Festival* during Seniors Week.

Choir leader **Margaret Shilton** and Music

Ensemble conductor **Juliette Zeelander** were interviewed on 3MBS-FM in November 2009.

Member **Brian Jensen** and Psychology tutor **Dr Peter Salmon** were interviewed by the Herald-Sun for a special feature on baby boomers, published in November 2009.

Students from RMIT University produced a radio documentary on U3A

Melbourne City which was broadcast on 3RRR's *Room with a View*.

Promotional presentations were made by Committee members to the following groups:

- Carlton Senior Citizens Centre
- East Melbourne Residents Group
- Rotary, Camberwell

"I think U3A and all it has to offer is a fabulous opportunity for people of a 'certain age' to stretch their minds. I am deeply grateful for all that is being done."
(Chess student)

"The program's very comprehensive and allows a lot of choice—something for everyone." (Student)

Grants and Donations

Granting Body	Amount	Purpose
City of Melbourne	\$4,550	Community Services Grant for delivery of IT training to seniors.
Dept. Planning & Community Development	\$1,908	Program Growth Funding—Promotional DVD
Commonwealth Dept. of Families, Housing, Community Services & Indigenous Affairs	\$3,300	Volunteer Grant for purchase of teaching equipment.
City of Melbourne	\$500	Seniors Grant
City of Melbourne	\$191	Seniors Week—Active Living Grant
Members	\$1,047	Patrons and donations
TOTAL	\$11,496	



Dr Rick Swindell, guest speaker at the 25th Anniversary Lunch



Jim Norton, Treasurer

*"U3A is a great boon
– always a challenge,
and enables us to
participate in many
thought-provoking
courses."
(Shakespeare
student)*

Summary of Income and Expenditure

for the year ended 30th September 2010

	Financial Year 2009 – 2010 \$
<u>Income</u>	
Membership Fees	35,468
U3A Network	9,079
Grants	10,449
Social Activities & Forums	4,461
Bank & Investment Interest	3,253
Patrons & Donations	1,047
Miscellaneous	410
	<u>64,167</u>
<u>Expenditure</u>	
Ross House Rent	21,470
Other Rent	10,956
Promotions/Seniors Week	6,235
Newsletter	4,383
Social Activities & Forum	4,637
Computer Equipment	4,308
Telecommunications	2,754
Office Supplies	1,954
Tutor Supplies	1,018
U3A Network Membership	853
Volunteer/Committee Expenses	786
Miscellaneous	286
	<u>59,640</u>

Balance Sheet

for the year ended 30th September 2010



Winter Lunch at William
Angliss

<u>Current Assets</u>		<u>Liabilities</u>	
Bank	14,172	Opening equity 1/10/09	84,813
Investment	87,375	Plus surplus provision for unpaid debts from year to 30/09/2009	426
Sub total	<u>101,547</u>	Plus surplus for year to 30/09/10	4,527
<u>Fixed Assets</u>	0	Equity at 30/09/10	<u>89,766</u>
<u>Total</u>	101,547	Provision for unpaid debts	11,781
		<u>Total Liabilities</u>	101,547

APPENDIX 1: VOLUNTEERS

It give us great pleasure to recognise members who have made a contribution to the ongoing sustainability and success of U3A Melbourne City. If your name has been omitted we apologise, but know that your contribution was valued and appreciated and that we are working to improve our volunteer record-keeping.

Hilary Adair, *Tutor*
 Janet Allard, *Casual*
 Flora Anderson, *Casual*
 Diana Andrews, *Committee*
 Michael Baker, *Tutor*
 Julia Beaty, *Tutor*
 Ron Bennett, *Casual*
 John Besley, *Tutor*
 Diana Bianciardi, *Tutor*
 Eleanor Blyth, *Casual*
 George Boag, *Committee, Tutor*
 Paul Boland, *Tutor*
 Joyce Bromage, *Office*
 Katharina Budde, *Tutor*
 Necia Burford, *Forums, Promotions*
 Marilyn Burt, *Newsletter*
 Lyndsey Burton, *Casual Archives*
 Shirley Byron, *Office, Committee*
 Betty Caldwell, *Tutor*
 Kevin Casey, *Tutor*
 Noreen Cassin, *Class support*
 Suzette Chapple, *Archives*
 Hellen Chin, *Office*
 Bill Claiborne, *Tutor*
 Valmai Cleary, *Office*
 Alan Close, *Tutor*
 Patricia Collins, *Office*
 Trish Conwell, *Tutor*
 Barbara Cramer, *Casual*
 Blair Cramer, *Tutor*
 Elma Crosbie, *Casual*
 James Cruz, *Tutor*
 Chris Dargan, *Tutor*
 Dorothy Davis, *Tutor*
 Joan Deerson, *Tutor*
 Karen Dupleix, *Office*
 Elsy Edwards, *Tutor*
 Kelvin Edwards, *Tutor*
 Judy Eldred, *Tutor*
 Fran Ellis, *Office*
 Rhonda Favalaro, *Tutor*
 Barry Fenton, *Office*
 Theresa Ferrer, *Casual*
 Jack Foks, *Tutor*
 Elizabeth Fox, *Casual*
 Michael Fox, *Course Support*
 Anne Foxtan, *Office*
 Virgil Gill, *Office, Casual*
 Liz Gloury, *Tutor*

Margaret Graham, *Office*
 Marguerite Grynberg, *Tutor*
 Carmel Hamilton, *Group Leader*
 David Hanson, *Casual*
 Nancy Hanson, *Office*
 Rod Hawken, *Tutor*
 Glen Hayton, *Class support*
 Lucy Hayward, *Tutor*
 Susan Heath, *Casual*
 Del Heaton, *Casual*
 Ann Hewett, *Tutor*
 Christina Hill, *Tutor*
 Robert Hooke, *Tutor*
 David Hone, *Tutor*
 David Hunt, *Fundraising*
 Mary Horsfall, *Group Leader*
 Anne Irwin, *Promotions*
 Rom Jagielski, *Tutor*
 Brian Jensen, *Casual*
 Sandra Joicey, *Tutor*
 Marg Jungworth, *Casual*
 Alice Landau, *Casual*
 Margaret Ledley, *Tutor*
 Helena Ling, *Committee, Admin*
 Rhoda Lysakowski, *Tutor*
 Hazel Kalmek, *Casual*
 Mahes Karuppiah, *Tutor*
 Maureen Kelly, *Office*
 Alma Kristensen, *Tutor*
 Heather Kudeviita, *Tutor*
 Radmilla Leeman, *Casual*
 Charlotte MacLatchy, *Archives*
 Hedy Mameghan, *Class support*
 Jean Mapp, *Office*
 Tom Marshall, *Casual*
 Juan Martinez, *Tutor*
 Erika Martens, *Tutor*
 Sadako Martin, *Tutor*
 Juan Martinez, *Tutor*
 Shirley Mason, *Office*
 Karen Mather, *Tutor*
 Robert May, *Committee, Tutor*
 Anne McGravie, *Tutor*
 Ben Megens, *Office*
 John Meir, *Tutor*
 Eva Meredith, *Group Leader Office*
 Tony Miles, *Committee, Promotions*
 Jan Miller, *Website, Archives*
 Peter Morgan, *Committee*

Julie Nankervis, *Course Coord, Committee*
 Jim Norton, *Committee*
 Chiarina Pascuzzi, *Course Support*
 Frances Patterson, *Casual*
 Helen Pettet, *Casual*
 Val Pincus, *Committee, Office*
 Marylou Phillips, *Casual*
 Jocelyn Preece, *Newsletter*
 John Radecki, *Tutor*
 Margaret Rees, *Office*
 Anne Rickards, *Casual*
 Anne Riddell, *Casual*
 Cate Rowland, *Tutor*
 Shinei Sakai, *Tutor*
 Peter Salmon, *Committee, Tutor*
 Gisela Schade, *Tutor*
 Fran Sciarretta, *Office*
 Marie Scomazzon, *Class support*
 John Shilliday, *Committee, Archives*
 Margaret Shilton, *Tutor*
 Libby Smith, *Tutor*
 Margaret Smith, *Office, Archives*
 Keith Stewart, *Office*
 Helen Stielow, *Office*
 John Stirling, *Tutor*
 Eric Stokes, *Tutor*
 Annette Sue, *Casual*
 Mary Sweeney, *Tutor*
 Jill Thompson, *Committee*
 Alison Thornton, *Office*
 Shirley Tuckwell, *Casual*
 John Waldie, *Tutor*
 David Watson, *Course Support*
 Max Warlond, *Casual*
 Edward Weiss, *Tutor*
 Betty Westerland, *Tutor*
 Shirley Whiting, *Casual*
 David Williams, *Casual*
 Maud Williams, *Tutor*
 Richard Willmott, *Tutor*
 Tim Wilson, *Tutor*
 Carol Wright, *Tutor*
 Patricia Young, *Casual*
 Juliette Zeelander, *Tutor*



Office volunteer and Life Member, Joyce Bromage

“.. those who regularly engage in ..voluntary activities enjoy better health and live longer thanks to the stimulating environments and sense of purpose engendered by their activities.”

Swindell, R, 2009
Educational Initiatives for the Elderly.

Note: Casual volunteers assisted in several ways, including working party participation, promotional activities and mail-outs. Many Office Staff, Tutors and Committee Members also helped in these capacities, in addition to their nominal duties.

Next steps.....

Looking ahead to the future....our challenges are

- Increasing the proportion of our membership from the City of Melbourne
- Increasing the diversity of our membership and courses
- Diversifying our offerings
- Finding affordable teaching space in the City of Melbourne
- Attracting new tutors
- Diversifying our funding base
- Increasing our volunteer base

In 2010
we celebrated our

25th

Birthday
and
25 years
in the
City of Melbourne

Supporters

We gratefully acknowledge the support of the following organizations during 2010:



U3A Choir with choir leader Margaret Shilton, BMW Edge, October 2009



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246 Flinders Lane
Melbourne 3000

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E-mail: citymelb@u3a.org.au
Web: www.u3amelbcity.org.au

Inc. No. A0045765E
ABN 84 932 435 817