

# ANNUAL REPORT 2011-2012

## President's Report

### Highlights of 2011

- Strategic plan for 2011-2013 approved
- Surplus of \$13,934
- 3 successful grant applications totaling \$5200
- 67 members joined the Patrons Program
- Public forums introduced
- On-line course trial
- 25 new tutors
- 39 new courses
- 244 new members
- 4 new life members
- 2 student projects

***"Our mission is to foster positive, active ageing through lifelong learning, social interaction and volunteering."***

This is the end of my second year as President, and at the risk of sounding repetitive, I am still amazed at the vigour, intensity and energy of our organization! I think the U3A movement as a whole is a testament to the skills, abilities and all-round get-up-and-go of our post-retirement years.

None of this would be possible without the dedication and hard work of the Management Committee. Helena Ling as Secretary, has been instrumental in streamlining and 'professionalizing' the way we work. The Committee of Management, and the membership as a whole, owe her a huge debt of gratitude for the work she has put in. She's a wiz with grant applications, too...

When I first came I heard it said (more than once) – "Why do we need new members anyway?" Now I often hear it said that "I get such a lot out of U3A – it's a fabulous organization – and now I want to give something back." Giving something back takes many forms.

As you know, the City U3A has a problem that other U3As mostly do not have – in that we have to pay rent for every hour of every class we run. I would

especially like to thank the many generous members who under the Patron's Program, contributed additional funds to help us maintain the organization. We cannot rely on grants alone, and it is important not to increase fees beyond the capacity of people to belong!

Without the dedication of tutors, there would be no U3A at all. I am delighted to say that in 2011, with the co-ordination of Julie Nankervis, we have had a record number of new tutors and new courses which add considerable spice and variety to our program. It's a great deal of work. Thank you Julie and her team.

Many people join the U3A initially because of the social program, and this has blossomed under Shirley Mason and her team. You get regular notices about diverse and interesting events – as well as a monthly 'Let's do lunch' outing to eateries around Melbourne.

Necia Burford and her team is responsible for the booming Forums program at the Multicultural Hub. These have grown greatly and the monthly format proved a great success – up to 100 people attending a recent forum.



Jill Thompson, President

And when it comes to design, presentation and promotion, Tony Miles is always there with ideas to make everything look good.

The U3A movement continues to provide for the social and educational needs of a large number of people throughout Victoria and beyond.

However, we still rely on the voluntary contributions and efforts of members to make it work. The workload cannot be left to a few – whose jobs get larger and larger. If you are able to help, or want to talk over what you can contribute, please don't hesitate to get in touch with the office. We really want to hear from you.

Thank you again for all your enthusiasm and involvement for 2011, and all the very best for 2012.

*Jill Thompson  
President*



Our home—Ross House,  
Flinders Lane

*"I get a lot of rewards from volunteering, including working with wonderful people, learning new things and having to rise to the challenge."*

*Fran Sciarretta,  
Committee,  
Administration*

## 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

**\$5,200**

in competitive grants during this financial year.

### Patrons Program and Donations and Bequests

**\$5,715**

### Membership

We had

**920** members as at end September.

### Tutors and Courses

We had **68** volunteer tutors teaching

**3,800**

hours of classes. We offered

**48** full-year courses and

**52** short courses throughout the year.

## Organisational Achievements



At The Winter Lunch

- Approved a new strategic plan for 2011-2013
- Achieved a surplus of \$13,934
- Submitted five grant applications for 2012
- Gained support from the Federal MP for Melbourne for photocopying our newsletter
- Increased membership by 21% since 2007
- Recruited 25 new tutors
- and delivered 39 new courses
- Published the student feedback report
- Partnered with Sage Travel to lead two overseas tours in 2012
- Approved job descriptions for all major functions
- Trialled an on-line course in Democracy with 28 members
- Approved and published a refund policy
- Developed a historical database of courses and tutors as part of the archives project
- Increased advertising and promotional activities
- Explored regional development with contiguous U3As
- Sponsored two students projects: RMIT film documentary project and Monash database project

## Structure and Management

U3A Melbourne City is a not-for-profit incorporated association, which commenced operation in 1985. It is a membership-based organization run entirely by the volunteering effort of its members.

The Committee of Management is responsible for the performance of U3A Melbourne City and for guiding its strategic direction and ensuring that its operations are consistent with its mission. Minutes of meetings are posted on our website and available for perusal in the office by members.



The Committee is supported by a number of working parties which are aligned to the objectives of the Strategic Plan. The most active of these are the Volunteering and Events working parties. There is an open invitation to members to contribute their skills to helping our achieve our objectives.

The Committee, which met monthly, comprised three office bearers – President, Treasurer, Secretary – and ten ordinary members. Committee membership during the year comprised:

*Ms Jill Thompson, President*  
*Vacant, Vice-President*  
*Ms Helena Ling, Secretary*  
*Mr Jim Norton, Treasurer*

*Ms Diana Andrews, Member*  
*Mr Keith Bettles, Co-opted Member*  
*Mr George Boag, Member*

*Mr Jack Foks, Member*  
*Ms Necia Burford, Member*  
*Ms Shirley Mason, Member*  
*Mr Tony Miles, Member*  
*Ms Julie Nankervis, Member*  
*Dr Peter Salmon, Member (resigned)*  
*Ms Fran Sciarretta, Member*  
*Mr David Watson, Member*



Chess at Federation Square

*"I enjoy my time with folk at U3A and continue to learn every day. U3A gives us all a communication with many different walks of life. At age 81, I am proud to have been part of the crowd for so long."*

*Margaret Ledley, Tutor*

## Social Activities

Shirley Mason and the Events Team organised the following activities which attracted an increased number of participants:

- Chinese Heritage Tour
- Mental Health Research Institute Visit
- Millionaire Hot Seat
- Jonathon Welch Concert
- Marysville Coach Trip
- Theatre-Home for Lunch
- Love Never Dies
- Tutankhamun Exhibition

### • Mystery Coach Trip

A very successful lunch club was established with over 30 registered members and 16 regular participants. Each month, they sample affordable international cuisine at restaurants within the CBD and suburbs.

The Winter Lunch at William Angliss became a themed event, complete with prizes, guest speaker, and music thanks to Shirley's team

and the events management students. It was attended by 95 members.

A lunch at the Multicultural Hub was held in December to recognize and celebrate the contribution of our volunteers with catering by the Asylum Seekers Resource Centre and music by the U3A Music Ensemble. It was attended by 60 volunteers.

*Shirley Mason*  
*Social Coordinator*



Tony Miles and Elma Crosbie at Federation Square



At the Winter Lunch

*"I am very pleased to be a member of such a vibrant and interested group of people. U3A has given me the opportunity to continue my interest in learning as well as a chance to teach. What this means to me is that there really is no use-by-date on learning."*

Joan Gravina, Tutor



President Jill Thompson at the Mind Body Soul Festival, Seniors Week

## Membership

### Members by Sex

Male	24.7%
Female	75.1%

### Age Range

86-95	5.2%
76-85	24.0%
66-75	41.4%
56-65	24.9%
46-55	2.2%
Unstated	2.2%

### Members by Type

Member	79.3%
Associate	7.0%
Joint	11.1%
Life	1.2%
Honorary	1.4%

### Other

Registered as volunteer	21%
Members with Email	71%
Members from City of Melbourne postcodes	22%

### Life Members

- John Besley
- Joyce Bromage
- John Cramp
- Marguerite Grynberg
- Marie Einoder
- Lillian Emmanuel
- Ann Hewett
- Margaret Ledley
- Alan Liubinas
- Eva Meredith
- Ailsa Miles
- Val Pincus
- Will Semler
- Margaret Shilton
- Nan Wingfield

## Courses and Tutors

Another fantastic year! We provided a wonderful stimulating course program, with 70 tutors offering 100 yearlong and short courses on a wide range of topics. Happily we retained the enthusiasm of yearlong tutors and added a few more. The continued growth in short courses has been exciting, with 33 new courses expanding last year's short course list. Short courses, running 6 sessions on average, give members the opportunity to explore new interests throughout the year and introduce tutors to our members and philosophy prior to a longer commitment.

Trialling an online, interactive blog version of our *Democracy* short course also proved a very successful initiative. Going online anytime in the week to read and post their comments provided members with a new way to experience and access our courses. Feedback and evaluation of

this trial will form a basis for future online courses.

Recruiting new tutors remained a priority. We liaised with 48 people from our membership base or general public who enquired about running a course during the year. Of these, 25 were approved as tutors who bring their passion and knowledge to our program. Many have already run their course in 2011, while others are lined up for 2012. Delivering a growing number of courses however challenges our access to suitable, affordable accommodation in the city, an ongoing issue for 2012.

Our members continue to enjoy and praise our education program through their attendance and feedback. The enthusiasm of the students in the Basic Art Skills course was additionally shown by an informal exhibition of their works at the end of the course. Public

performances of the Choir and Music Ensemble took this enthusiasm to a wider audience.

The focus of written feedback this year was on short courses, with students again valuing the topics covered, the knowledge, passion and interactive style of tutors. Many wanted more sessions to extend the topic or branch into related areas as they enjoyed the course so much. Inevitably there are drop-outs, but data collected this year indicates that three quarters do so due to health, family and time pressures rather than factors related to the course.

Our program continues to be supported by Tutor meetings, workshops and liaison by the Course Coordination team. We thank all the tutors for their outstanding contribution to U3A Melbourne City and anticipate further growth and enjoyment in 2012.

Julie Nankervis  
Course Coordinator



## Forums and Events

The 2011 program was a runaway success and open to the public, thanks to a community services grant from the City of Melbourne. This enabled us to promote our activities to a broader audience, attract new members and volunteers, and raise our profile.

Nearly 500 people attended the 2011 program of which 90 were members of the public.

We thank our speakers who so generously donated their time to bring us a stimulating program of lectures.

Three quotes from a plumber—**Sally White**

A bloody business—**Dr Peter Schiff**

Factors in successful ageing—**Annabel Battersby**

Brain matter(s)—**Prof Geoff Donnan**

Restoring our icons—**Peter Lovell**

Judgement day—**Chris Gill**

Why don't nobody talk proper no more—**Prof Kate Burridge**

Sustainable Melbourne—**Cnr Dr Cathy Oke**

The U3A Choir and Music Ensemble gave a number of performances throughout the year, including at Melbourne Town Hall during Seniors Week.

*Necia Burford  
Forums Coordinator*



**Prof Kate Burridge,**  
Forum presenter

## Community Consultations and Public Relations

**Jill Thompson, Helena Ling** and **Tony Miles** participated in City of Melbourne community consultations on the role of senior citizens centres.

**Helena Ling** attended the Eldership Forum which explored the concept of eldership and the potential roles of elders in our society.

**Lyndsey Burton** participated in a panel discussion on *Writing your U3A's History* at the U3A Network Conference.

**George Boag** ran a workshop on buying online for the City of Melbourne's *Food and Nutrition Forum*

**Jill Thompson and Helena Ling** participated in an Education Week for residents of the Kensington Re-development

**Jill Thompson** addressed a Combined Churches meeting in Ashburton

**Jill Thompson and Helena Ling** attended the annual presentation of Seniors Awards at Government House.

**Jill Thompson and Helena Ling** represented U3A at the *Mind, Body Soul Festival* at Fitzroy Gardens during Seniors Week and tutor **Max Warlond** gave a talk on fitness and active ageing.

**Jill Thompson** consulted with community groups on strategies to develop partnerships with CALD communities.

**Anne Irwin** coordinated our participation in the U3A Carnival of Learning at Federation Square.

*"The craft group satisfies the creative passion of members, and the friendship is invaluable to each person. The state government should pay us to attend the class- it keeps us physically and mentally stimulated and out of the need to provide us with nursing homes."*

*Craft student*

## Grants and Donations

Granting Body	Amount	Description
City of Melbourne	\$3,000	Community Services Grant for Seminars for Seniors.
Dept. Planning & Community Development	\$1,700	Program Growth Funding
City of Melbourne	\$500	Seniors Grant
Members	\$4,715	Patrons and donations
Estate of M. Crabtree	\$1,000	Bequest
TOTAL	\$10,915	



**Cr Dr Cathy Oke,**  
Forum presenter



Jim Norton, Treasurer

*"The research on health and volunteering suggests that people who stay active and productive through volunteering are likely to benefit through improved psychological and physical health. The evidence also suggests that volunteers live longer".*

*Warburton, J. & M. Lovell, Productive Ageing Research Bulletin, 1,4,2005 .*

## Summary of Income and Expenditure

the year ended 30th September 2011

		Financial Year 2010-2011 \$
<b>Income</b>	Membership Fees	40,985
	Social and Forum	14,789
	U3A Network	7,000
	Patrons and donations	5,899
	Grants	5,200
	Bank and investment income	4,474
	Sage Travel	2,500
	Miscellaneous	419
		<u>81,266</u>
<b>Expenditure</b>	Ross House Rent	23,958
	Other rent	9,142
	Social and forum	14,463
	Newsletter	4,474
	Office expenses	4,112
	Promotions	2,763
	Computer grant	2,325
	Volunteer/Committee Expenses	1,418
	Telecommunications	1,350
	U3A Network subscription	1,306
	Tutor supplies and equipment	1,280
	Miscellaneous	741
		<u>67,332</u>



*Forums Volunteers:  
Necia Burford, Anne  
Woodward, Bev Peterson*

## Balance Sheet

for the year ended 30th September 2011

<u>Current Assets</u>	\$	<u>Liabilities</u>	\$
Bank	12,788	Opening equity 1/10/10	89,766
Investments	102,838	Plus surplus for year to 30/9/11	13,934
Sub-total	115,626	Equity at 30/9/11	103,700
<u>Fixed Assets</u>	0	Provision for unpaid debts	11,926
<u>Total Assets</u>	115,626	<u>Total Liabilities</u>	115,626

## APPENDIX 1: VOLUNTEERS

It gives 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  
 Flora Anderson, Tutor  
 Diana Andrews, Committee  
 Michael Baker, Tutor  
 Avara Becirevic, Choir Pianist  
 Ron Bennett, Casual  
 John Besley, Tutor  
 Keith Bettles, Committee, Room Bookings  
 Diana Bianciardi, Tutor  
 Eleanor Blyth, Office  
 George Boag, Committee, Tutor  
 Joyce Bromage, Office  
 Berniece Bryant, Casual  
 Bronwen Bryant, Tutor  
 Robert Buckley, Tutor  
 Katharina Budde, Tutor  
 Necia Burford, Committee, Forums  
 Lyndsey Burton, Archives  
 Shirley Byron, Events  
 Betty Caldwell, Tutor  
 Peter Caldwell, Casual  
 Valmai Cleary, Office  
 Alan Close, tutor  
 Patricia Collins, Office  
 Blair Cramer, Tutor  
 Elma Crosbie, Casual  
 Chris Dargan, Tutor  
 Dorothy Davis, Tutor  
 Bob Di Napoli, Tutor  
 Brian Doyne, casual  
 Peter Dunn, Office  
 Karen Dupleix, Office  
 Del Durrant, Tutor  
 Inez Dussuyer, Tutor  
 Kelvin Edwards, Tutor  
 Judy Eldred, Tutor  
 Jean Fahey, Events  
 Rhonda Favaloro, Tutor  
 Barry Fenton, Office  
 Christine Ferrari, Tutor  
 Mary Fogarty, Casual  
 Jack Foks, Committee, Tutor  
 Eric Ford, Tutor  
 Michael Fox, Group Leader  
 Wendy Fox, Casual  
 Anne Foxton, Office  
 Jenny Fraser-Smith, Casual, Volunteering WP  
 Virgil Gill, Office  
 Liz Gloury, Class asst.

Judith Goddard, Casual  
 Veronica Goodwin, Casual  
 Margaret Graham, Office  
 Joan Gravina, Tutor  
 Val Green, class asst  
 Clare Griffin, Events  
 Marguerite Grynberg, Tutor  
 Angela Hamilton-Smith, Tutor  
 Peter Hannaford, Tutor  
 David Hanson, Casual  
 Nancy Hanson, Office  
 Anna Harley, Course Coord Team  
 Patricia Hart, Casual  
 Rod Hawken, Group Leader  
 Glen Hayton, Class Asst  
 Maud Heron-Williams, tutor  
 Ann Hewett, Group Leader  
 Christina Hill, Tutor  
 David Hone, Tutor  
 Barbara Hook, Casual  
 Robert Hooke, Tutor  
 Mary Horsfall, Group Leader  
 Anne Irwin, Casual  
 Rom Jagielski, Tutor  
 Sandra Joicey, Tutor  
 Zofia Joshi, casual  
 Marg Jungwirth, Group Leader  
 Chris Kelly, Database Project  
 Maureen Kelly, Office  
 Vicki Kelly, Database Project  
 Anna Krepp, Course Asst.  
 Alma Kristensen, Tutor  
 Heather Kudeviita, Tutor  
 Alice Landau, Casual, Events  
 Margaret Ledley, Tutor  
 Helena Ling, Secretary  
 Rhoda Lysakowski, Tutor  
 Charlotte MacLatchy, Archives  
 Jean Mapp, Office  
 Erika Martens, Tutor  
 Sadako Martin, Tutor  
 Juan Martinez, Tutor  
 Shirley Mason, Committee, Office  
 Maureen McDermott, Tutor  
 Ben Megens, Office  
 John Meir, Tutor  
 Julie Melbourne, Tutor  
 Eva Meredith, Group Leader  
 Tony Miles, Committee, Promotions

David Miller, Tutor  
 Jan Miller, Website  
 Peter Morgan, Casual  
 Julie Nankervis, Committee, Course Coord,  
 Robert Newbold, Class Asst.  
 Jim Norton, Treasurer  
 Hugh Oates, casual  
 Tony O'Brien, Group Leader  
 Ray Over, Tutor  
 Ian Pearson, Tutor  
 Bev Peterson, Office  
 Helen Pettet, Office  
 Marylou Phillips, Office  
 Val Pincus, Group Leader, Office  
 Jocelyn Preece, Editor, Group Leader  
 Maria Proudlock, Database Project  
 Margaret Rees, Office, Mailout Coordinator  
 Anne Rickards, Office  
 Anne Riddell, Editor  
 Rosemary Ryall, Events  
 Shinei Sakai, Tutor  
 Peter Salmon, Tutor  
 Gisela Schade, Group Leader  
 Elfie Schmidt, Tutor  
 Fran Sciarretta, Committee, Office, Admin  
 Marie Scmazzon, Class Asst  
 Mike Shackleton, Office, newsletter team  
 Malcolm Shepherd, Casual  
 John Shilliday, Archives  
 Margaret Shilton, Tutor  
 Margaret Smith, Office, Archives  
 Kristina Somerville-Lee, Casual  
 Diane Sotiriou, Office  
 Robert Spagnolo, Class Asst.  
 Keith Stewart, Office, Admin  
 Helen Stielow, Office  
 Eric Stokes, Tutor  
 Mary Sweeney, Tutor  
 Jeanette Thomas, Class Asst.  
 Jill Thompson, President  
 Alison Thornton, Office  
 Ida Tipping, Events  
 John Waldie, Tutor  
 Max Warlond, Tutor  
 Newsletter Team

David Watson, Committee, Course Coord Team, Edward Weiss, Tutor  
 Betty Westerland, Group Leader  
 Bernard Wheelahan, tutor  
 Colin White, Tutor  
 David Williams, Mailout  
 Tim Wilson, Tutor  
 Anne Woodward, Casual  
 Carol Wright, Tutor  
 Brenda Young, Casual  
 Patricia Young, Casual  
 Juliette Zeelander, Tutor



*Events Volunteers:  
 Shirley Byron, Diana Andrews,  
 Tony Miles, Shirley Mason*

*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

## Supporters



Volunteers at the U3A Carnival of Learning at Federation Square, 2011



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