

# THE UNIVERSITY OF THE THIRD AGE

## NORTHWEST REGION

### NEWSLETTER JANUARY 2018 No 50



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## ACTING CHAIR'S MESSAGE



Happy New Year to all our 40,000 U3A members in the North West of England. I hope that 2018 is a good year for you.

As with most of our U3As, the North West Region is a registered charity and required to conform to charity law. Having completed our annual report and accounts for the year ending 31<sup>st</sup> March 2017, these were registered with the Charity Commission and are now recorded on the commission's website.

I attended the Music Makers Day in Liverpool on 11<sup>th</sup> December. Despite the travel disruption, which prevented some of our Welsh guests arriving, there was a good turnout for an excellent event.

Our newest U3A is in Wigan. I have attended two meetings of their Steering Committee meetings and good progress is being made.

I represented Gill, our trustee, at a meeting of the Lancashire & Merseyside

Network in Liverpool on 11<sup>th</sup> January. The two events that have been held were very successful. Future events will include a Craft Fare, History of Liverpool Study Day, a Quiz and U3A Ball. My own U3A in Upholland have agreed to join the network.

Our 2018 Summer School details have been published on our website. Once again we will be at Newton Rigg College in The Lake District. We are offering a choice of ten courses and bookings are now being taken. Last year the Summer School was full and we anticipate that many of this year's courses will also be fully booked. If you plan to attend, please send your registration forms to me as soon as possible to avoid disappointment.

A handwritten signature in black ink that reads "N. D. Stevenson". The signature is written in a cursive style and is underlined.

Neil Stevenson

# TRUSTEE NEWS AND TOPICS



Hello U3A members, and Happy New Year.

If my year continues as it has begun, it will definitely be busy. I have already been to London for meetings, which included a training day on 'Conflict Resolution', a meeting about IT, and a meeting with the National Subject Advisors. I will be back in London at the end of the month for a training workshop on 'Running Your U3A' and NEC meetings. In addition, I have been to meet U3As who are having problems and exchanged numerous emails with U3A members and National Office.

Maybe I should write a book: A Month in the Life of the Regional Trustee. It's fairly intense at times, occasionally frustrating, but also very enjoyable and interesting. I am approximately half way through my term of office and would be happy to speak with anyone who might be interested in taking up the post when I retire. I would suggest that the main requirements are to retain a sense of humour and be willing to learn new skills whilst developing multiple personalities and meeting new challenges.

We now have several people in the North West who have become Third Age Trust volunteers and have been trained in the start-up process of new U3As. Some of them will also go on to be trained in problem solving and facilitating workshops. Anyone interested in future training should let me know.

The year ahead will have plenty to offer. In February there is a national training day for Data Protection; Safeguarding; Equality, Diversity and Inclusion and, finally, Insurance. The Regional team are developing a programme for the rest of the year beginning with 'Your Best Ever AGM' in Preston. The 2018 Summer School is ready for registration and the plans for the Regional AGM and Conference are well underway. More events are being considered.

The NWREC will be looking for new members this year so please consider joining them.

I hope 2018 proves to be a happy and successful one both in your U3As and in your personal lives. I look forward to meeting many of you in the coming months.

**Gill Russell**

**NW Regional Trustee**

# TRUSTEE PRACTICAL TOPICS

## New clause and social accounts

Before Christmas, two letters from National Office were sent to all U3As. They contained a considerable amount of information including some important amendments to financial advice.

There was also a new object clause for our constitutions. This was developed to clarify the link between learning activities and social activities because the Charity Commission is now asking for ALL our accounts to be declared. There has always been contention about what is social, and far too many grey areas. The new clause is all encompassing. It acknowledges that most of our learning activities have a social element and most of our social activities have a learning element.

You are being advised to adopt this clause, whether or not you are registered with the Charity Commission, in order to ensure that all your activities are covered and to do so you need to contact National Office to declare your intention, then bring it as a resolution to your next AGM. The Charity Commission has offered to allow a 'blanket' cover to make the change so that individual groups do not have to contact them directly. Please ensure that you read the office mailings to clarify the time line for this and if you need advice please contact me as soon as possible.

## Financial details

*I get many questions about finance and with the change in requirements by Charity Commission I am sure there will be more.*

*From your financial year commencing after 1<sup>st</sup> April 2018 you will be required to declare ALL your income. This will inevitably push some groups over the £5000 limit. It is essential that you check your accounts carefully and do not attempt to withhold funds to keep your bank balance low.*

*Here are some of the questions:*

*Does the £3.50 capitation fee need to be included in our income?*

*Yes. It is paid to you as part of your management budget so that you can pay it to the Trust.*

*We pay for our venues in cash so it never gets paid into our account.*

*It is still classed as income. All payments should go through your main account. If the Committee has agreed that groups can pay their own expenses they must obtain a receipt for the Treasurer to add the information to the account. Incidentally, interest groups should not enter into a contract with a venue. This must be done by the committee.*

*Is Gift Aid classed as income?*

*Yes. It is a benefit and therefore is paid for the use of the U3A members. With the new clause it now does not matter which events are social and which are educational. They are all part of your membership fee.*

*Are holidays included?*

*If a holiday has been arranged by the U3A for their members, this is income. Most holidays of this type have an educational element.*

## Inclusiveness and diversity

**Both of these come up frequently in conversations with members and Gill would welcome your comments on how we might address them. Some U3As have already created a policy. Some have created a working party or appointed a committee member to develop advice. The U3APlus committee would also like input from groups so please share your experience and advice. You can view their website at <https://plus.u3a.org.uk>**

## National Subject Advisors and Resource Centre



Are you aware that you can get advice and support from National Subject Advisors and from the Resource Centre at National Office? I recently attended a meeting of Subject Advisors where we discussed the sort of support they could offer to interest groups in their subject but also how to develop that support by possibly creating support teams. There will be more discussion about this. The contact details are available via the National website or the Third Age Matters magazine.

### NW REGIONAL COMMITTEE

#### WEBSITE REGIONAL SPEAKERS LIST

Please note that the speakers on the list are NOT approved by the Regional Committee. We do not book them or negotiate fees. The list has been created from recommendations made by U3As but the Regional Committee has not vetted them in any way. It is important that individual groups contact the speakers to determine suitability and cost. If you have enjoyed a speaker not on the list, please contact myself or a member of the Regional Committee so their name can be added.

## FORTHCOMING EVENTS

### NW REGIONAL WORKSHOPS

**February 28 2018** 'Your Best Ever AGM'. Come and join Much Wittering in the Marshes as they prepare to hold their AGM - and spot the deliberate mistakes! There will be an opportunity to spot the deliberate mistakes and then to join breakout groups to discuss best practice. Booking is going well so if you plan to come please register as soon as you can. Details can be found on the Regional website.

THESE Workshops are organised by NW Region and/or Networks. Details are available in future newsletters, Flyers and on the website when appropriate. All of our workshops are developed from members' suggestions, which we welcome.



## **U3A NORTH WEST REGIONAL**

### **SUMMER SCHOOL 2018**

**NEWTON RIGG  
AGRICULTURAL COLLEGE,  
NEAR PENRITH,  
AUGUST 28<sup>TH</sup> - 31<sup>ST</sup>**



Following the success of last year's Summer School our planning is now complete for this year. It will again be held in Newton Rigg and there will be 10 courses, see below. Full details of all the courses and booking arrangements are available on the regional website.

Please note: all the tutors are U3A members who give their time freely to share their expertise and interest. If you ever feel you would like to run a course for the summer school please let the NWREC know.

COURSE NAME	TUTOR
Ruskin and His Legacy	Meg Shaw
Housing, Modernism and Architecture	Clyde Raine
What did the Romans ever do for us?	Maggie Simms
Lake District Minerals	Christine Arkwright
Modern Medicine	Gill Baynes
Recorder Playing	Marlene Phillips
Science is for Everyone	Bob Roach
Making friends with Music	Jack Wood
The Wars of the Three Kingdoms and Two Generals	Brenda Cubbon
Twentieth Century Russia from Tsarism to Communism and then what	Edward Towne

## AROUND THE REGION/

### FORTHCOMING EVENTS

The Vikings: Rediscover the Legend. In April (date to be confirmed) a mixed group from several U3As will be visiting this British Museum exhibition during its showing at the Atkinson Gallery in Southport. It is a touring exhibition from the British Museum. In addition to a tour of the exhibition we hope to have a lecture by a visiting speaker. U3As will get a discounted entrance fee.

Both of these activities are being organised by Maggy Simms. If you would like to contact Maggy please use the following email address but indicate which subject

[members.buryu3a@gmail.com](mailto:members.buryu3a@gmail.com) Subject:  
Archaeology group or Vikings

### U3A University Challenge?

#### Intergenerational Shared Learning Project

Knustsford U3A has been involved with a project involving students from local secondary schools. Both groups say that they have found the experience helpful and they have all learned from each other. The project will continue and other groups from the South Cheshire network are considering taking it on.

### The Big Sing

The Greater Manchester U3A Network is organising a Big Sing Concert, open to all U3A members, to be held at the

Royal Northern College of Music in Manchester in September 2018. A programme of popular songs and songs from the musicals will be rehearsed under a Halle conductor, with piano accompaniment, and a single mid-afternoon performance will take place.

Members are invited to register their interest on the events page of the U3A North West Regional website <https://u3asite.org.uk/north-west>

The cost for participation will be in the range £15 to £20.

The number of registrations of interest received by 28 February 2018 will be used to determine the performance fee, advice on the payment of which will be given at a later date.

### **Proposed workshops:**

**Meet the Committee** This is being considered as a follow-up to the Gruesome Governance presentation at the 2017 National Conference and AGM. Keep an eye open for more details when they become available.

**Network Link** A meeting in London last year was attended by people from all over the country and the delegates said they would like to continue. Another one will be held in London in May and later in the year, probably in Birmingham. These two venues were voted for by the attendees.

The NWREC have discussed arranging a Regional network link. Date and time, to be confirmed. If you would like to suggest items for discussion please contact the Trustee at [gillruss71@gmail.com](mailto:gillruss71@gmail.com)

## DEESIDE & WIRRAL U3A NETWORK: SCIENCE GROUPS DAY

The network has planned a day to promote and advise Science groups and to encourage exchange of experiences or ideas. This event is at Heswall Hall on 30 April. Aimed at Group Leaders, and others interested in science, there will be a speaker from Institute of Physics, with the U3A subject advisor for science also attending. All U3A members welcome. Contact details and further information can be found on the Deeside & Wirral website and on the Regional website.

[www.u3asites.org.uk/Deeside-Wirral](http://www.u3asites.org.uk/Deeside-Wirral)

[www.u3asites.org.uk/North-west](http://www.u3asites.org.uk/North-west)

## RECENT EVENTS/ REPORTS

### Music day report back

In December, our Trustee Gill, organised a Music Day in Liverpool. It was a combination of study day, workshop, presentations and lots of fun. On arrival some refreshments, which included mulled apple juice and mince pies. Were shared. The first presentation was a performance by pianist Andrew Wilde who also talked about some of the pieces he was playing. The afternoon workshops for singing, ukulele, recorders and music appreciation offered a brief opportunity to share activities and suggestions for ways to develop them in U3As. There was a short concert by the singing and instrumental groups then after a refreshment break we heard from Chris Devereux. Chris is a member of Southport U3A and he performed some songs of historical interest, accompanying himself on a mandolin.

## FREQUENTLY ASKED QUESTIONS



*A U3A near my home says I can't join because I don't live in their post code. I was also asked for referees. I was not aware that there were such restrictions.*

*The Third Age principle says that 'Membership is open to all in their third age.....Members should do all they can ensure that people wanting to join a U3A can do so.' There should be no restrictions. Our Constitutions usually say '.....U3A and their surrounding locality' but this is intended to open up membership to anyone within easy reach, not to restrict it to a specific area. Asking for referees is not acceptable. This puts the U3A at the level of a club – which it is not.*

*Will the new data protection law apply to small charities like U3As?*

*It definitely will. The national workshop in Leeds on February 13th will be dealing with this.*

*And here's a question from me.....When did you last look at your Constitution?*

*This is an important document and is an essential part of your U3A management. You really shouldn't ignore it. Please check it regularly, especially with regard to committee terms of office and AGM procedures.....and don't forget to inform new committee members, who should all have a copy. So many U3As put it into a cupboard and forget it's there!*