



u3a Health Check – 10 key questions

This questionnaire is intended as a self-help tool only. It is for committees to use as a self-assessment checklist to help them to monitor the health of their own u3a. The results will not be seen by anyone else and it is entirely up to each u3a to make use of it or not as they wish.

Help is available from your Regional Trustee, the website or u3a Office, if you want it.

1. Do at least 90% of new members renew their membership after their first year of membership?

YES
NO

Retaining new members is critical to the future of your u3a. Low retention rates suggest that your u3a is not meeting the needs of new members.

2. Do you actively monitor your membership statistics each year?

YES
NO

Analysing your membership statistics will aid your understanding of how your u3a is performing and if your membership is inclusive and reflective of your local community. This should include year on year changes in total membership numbers and changes in retention rates, especially for new members.

3. Has your membership grown for 2 or more consecutive years?

YES
NO

Static or declining membership could imply that your u3a is not attracting new members. This may make life difficult when you need to find new committee members or set up new groups. Attracting new members is important to keep your u3a vibrant.

4. Have you managed your u3a finances without any unplanned deficits for the last 2 consecutive years?

YES
NO

The financial health of your u3a impacts your ability to invest in the resources and equipment that you need to keep your u3a healthy. Unplanned losses will inhibit investment.

5. Does your committee membership change on a regular basis and in line with your constitution?

YES
NO

It is important to bring new members onto the committee every year, if possible. This helps with continuity and avoids a period when most of your committee have to step down as all their terms of office expire at the same time.

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6. Do you have effective ways of communicating with all your members?

YES
NO

To be effective in communicating with members there are a variety of methods including the regular monthly meetings, email, post, telephone and your website, which you may be using now. However, in developing your u3a and recognising that members are increasingly used to using other methods, you should consider using the range of social media available to you including Facebook, Twitter or Zoom. You may also consider methods of checking to ensure your communications are reaching all your members.

7. If you divide the total number of members by the number of your groups – is the ratio of your number of members to number of groups less than 12?

YES
NO

Research has shown that vibrant u3as have a ratio of one group for every ten members. If you have a higher ratio, e.g. one group for every 12 or more members, then you have fewer groups than is ideal. This is likely to lead to more groups becoming full. This is especially discouraging for new members who cannot join the groups that they'd like to.

8. Has the number of your interest groups increased year on year?

YES
NO

Groups are the life blood of u3as. Creating more groups gives members more choice and widens their opportunities for learning.

9. Is your u3a open and welcoming to new members?

YES
NO

New members are the source of new ideas, new group leaders and new committee members. Are you encouraging all sections of your local community to join your u3a and making them welcome to join in?

10. Does at least 20% of your membership volunteer?

YES
NO

Volunteers should include anyone who contributes to your u3a including committee members, group leaders and their teams, meeters and greeters, tea and coffee makers, people who help put out chairs etc. u3as are run by volunteers carrying out a wide variety of tasks. If too few of the members actively volunteer, the u3a may be at risk. The indications are that u3as should aim to have at least 20% 'active members' who volunteer in some way best suited to their interests and abilities.

If you have answered **"NO" to four or more** of these questions, you may wish to consider developing an action plan to address these issues or seeking help from your Regional Trustee or u3a Office.

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