

Ordinary Resolutions presented from u3as for the 2023 AGM

In accordance with the Articles of Association of the Third Age Trust and Standing Orders two compliant resolutions have been submitted by u3as by the required date and the Board of the Third Age Trust have been notified.

A copy of the Articles of Association and Standing Orders can be found on the AGM page on the Trust [website](#).

In accordance with Standing Orders (Section 4) a resolution must be presented by one u3a and seconded by another and submitted with a supporting statement. Details of the resolutions are given below.

u3as have the opportunity to propose amendments to these resolutions. Amendments should be made by one u3a and seconded by another u3a in line with our Standing Orders (Section 7). The deadline for submitting amendments is **28th July 2023**. Amendments should be sent to the Company Secretary at CEO@u3a.org.uk

Amendments shall only be accepted if they do not introduce new matter and are not a direct negative of the original resolution. Amendments will be considered by the Board. The Board will in its absolute discretion determine whether or not an amendment is valid (Standing Orders Section 7)

The proposed resolutions are:

Resolution 1

Now that the u3a has in excess of 1000 u3a's, with the South East Region representing around 20% of the National figure, we request that the organisational review of the Third Age Trust is mandated to consider a mechanism to give greater status and input to smaller networks/clusters.

Proposed by Hastings and Rother u3a and seconded by Hailsham and District u3a.

Supporting Statement:

Some recently formed "informal" clusters have developed great momentum and are delivering more perceived value to their members than the larger regional networks, due to both locality and access to assistance. The historical structures within the u3a are in need of review and reform (indeed they are currently being reviewed). We believe a managed degree of "devolution" may be effective.

Resolution 2

This Annual General Meeting calls on the Third Age Trust to:

- 1. Adopt as a key strategic priority an increase in national u3a membership to at least 500,000 by the end of 2028*
- 2. Implement regular and substantial national promotional activities that enable this goal to be achieved*
- 3. To report on the implementation and impact of promotional activities at Board meetings and in Annual Reports*

Proposed by Royston u3a and seconded by Tring u3a.

Supporting Statement:

Introduction

The motion reflects a number of beliefs:

- That the u3a movement provides an extremely valuable service to its members at a very low cost
- That many more people could benefit from that service than currently do so
- That the Trust should do all it can, and much more than it currently does, to increase substantially the number of people benefiting from u3a membership.

It has been suggested that this statement should include specific details of the 'regular and substantial national promotional activities' that the Trust would be required to undertake if the motion is passed, to enable the Trust to present costings for them to the AGM.

Our view is that this reflects a misunderstanding of the purpose of the motion, which is strategic, not operational. The motion calls on the Trust to focus on membership growth as a key strategic priority. It does not, and should not, seek to micro-manage the work of the Trust by dictating operational details of how this strategic priority should be addressed through specific marketing activities and budgets. If the motion is passed, it will then be for the Trust's Board and paid staff to decide what activities will be most effective and affordable and act accordingly.

Background Data

u3as have around 400,000 members across the UK.

Many more people than this are no longer working full time:

- At the 2021 Census, 11.1 million people were 65 or older in England and Wales
- In February 2022, 12.5 million people received the state pension in England, Wales and Scotland
- In spring 2022, 3.6 million people aged 50 to 64 were economically inactive in the UK.

Based on these figures, it is reasonable to estimate that between 12 and 15 million people are eligible to join a u3a in the UK if they wish.



Hence, 400,000 u3a members are equivalent to only around 3% of eligible people; and, because some of our members belong to more than one u3a, the true percentage of eligible people who belong to one or more u3as is actually even lower.

In short, for every u3a member, there are at least 30 people who could be u3a members but currently aren't.

The motion calls for a target of 500,000 u3a members by 2028. This is a deliberately very modest target and represents less than 4% of people eligible to be members. It's quite likely that the target could be exceeded if the motion is passed and appropriate actions taken by the Trust in response to it.

The 'Four Ps' of Marketing

In conventional marketing theory, marketing strategies include the so-called Four Ps:

- Product: The goods or services offered to customers
- Place: How and where products are distributed to customers
- Price: The amount customers are charged
- Promotion: How customers and potential customers are made aware of products and persuaded to buy them

We can probably agree that the u3a movement has an excellent record on the first three of these. It provides a very wide range of valuable learning and leisure opportunities that respond flexibly to members' preferences, in accessible locations and online, at very low cost.

It follows that the low percentage of eligible people who are members of u3as can be explained, at least in part, by our collective failure on the 'Fourth P', Promotion. Put simply, we are just not good enough at telling over 12 million potential members about what we do and why they should join a u3a.

This is confirmed by anecdotal evidence from new members, who generally tell us that they had only recently become aware of u3as and what they do, and that they had heard about us from existing u3a members rather than from any sort of marketing activity.

The Trust's Aims

The Trust's 2022 Annual Report sets out four aims:

Aim 1: Continue to build on existing support and advice that enables u3as to maximise their potential

Aim 2: Develop ways for members to pursue interests through existing and new routes that expand on traditional u3a methods

Aim 3: Explore collaborative external relationships that help promote relevant values



Aim 4: Build on communications to promote the various roles of the Trust

These aims focus primarily on maintaining and developing the Trust's services to local u3as and their members. This work is certainly worthwhile but the overall emphasis is also rather inward looking and lacks ambition to grow our movement.

The 2022 Annual Report refers to the work of PR Advisers, a Trust Press and PR Officer and to the increasing use of online and social media communications. No doubt, these are steps in the right direction. However, the persistently low percentage of eligible people who actually belong to u3as and references in the Report to thousands of YouTube views, website hits and Twitter followers in the Report when potential new members are counted in millions, strongly suggests that we have a very long way to go in making our national promotional work as effective as it should be.

The motion therefore calls on the Trust to take the steps necessary to address this weakness and, by doing so, rapidly and substantially increase national u3a membership. To be clear, this would require significantly more effective promotional activity **at national level**, not simply encouraging or advising local u3as on what they could do more or better.

Finance

It is recognised that the Trust's financial position, though stronger than expected at the 2022 AGM, remains a constraint on new spending commitments; and national promotional activity **can** be extremely expensive, particularly on television, radio and in print.

However, the motion does **not** require these forms of promotion. There are many others that could be at least as effective and very much less expensive. For example, an interview or news story on breakfast or daytime television can reach millions of viewers at almost no cost.

Having said that, it should not be assumed that no additional money should be spent on national promotional activity. In the short term, funds can be diverted from other, lower priority activities; and in the longer term, well-designed promotional work will pay for itself through increased membership. If the target of an extra 100,000 members is achieved, this will bring additional income to the Trust of at least £400,000 per year.

Conclusion

We believe that the actions called for by the motion are necessary, realistic and affordable.

If implemented, they would extend the benefits of u3a membership to many more people and in doing so would strengthen local u3as, the Trust and our movement as a whole.

If you agree, please vote for the motion.