



## U3A Health Check - 10 key questions

This questionnaire is intended as a self-help tool only. It is for committees to use as a 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.

If you have any comments on the usefulness of the questions or suggestions for improvement to the document, please don't hesitate to send them to National Office.

We are constantly trying to improve support for U3As in line with members requirements.

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. 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.*

6. **Does your U3A have at least one 'general meeting' per month, this includes speaker meetings and coffee mornings?**

YES/NO

*Having regular meetings every month gives committee members and group leaders more opportunity to engage with members, especially new members, and identify potential to take on their roles. Many U3As have two or more such meetings each month.*

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 to new members? YES/NO**

*New members are the source of new ideas, new group leaders and new committee members. Closing your doors to them makes finding all of these more difficult.*

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 and away 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 the National Office.**