



Moseley, Kings Heath & District u3a

Venue Policy and Procedures

1. Introduction

1.1 This policy is aimed at helping Interest Group Facilitators (IGFs) choose and pay for suitable venues for their groups. It seeks to ensure that the level of financial subsidy members receive when attending group meetings in paid venues are in line with the MKH u3a Finance Policy whilst not imposing a significant financial burden on those members. The Executive Committee (EC) also need to ensure that the level of subsidy is fair (to all members) and financially sustainable.

1.2 The issue of subsidising venue costs is a dilemma and u3a's take differing views: - some u3as pay for all venue costs out of the subscription and set a higher subscription level; and other u3as pay no venue costs out of the subscription and expect groups to be wholly self-funding, potentially making some groups not financially viable.

Your EC has always followed a compromise approach between these extremes, expecting members to fund venue costs up to a certain level (previously called AVCs) and subsidising above that level where necessary, trying to take account of different circumstances. For example, the EC (this U3A) are more generous in funding start up groups which have not yet attracted sufficient members to cover their costs.

Other issues include:

- recognising accessibility issues;
- some members being on a limited income; and,
- where members are unable to attend meetings for a sustained period due to illness or other commitments.

1.3 Groups have flexibility in addressing these issues when making decisions about venue costs. The EC is not proposing to change that practice but venue costs are increasing. The EC would ask IGFs to seek to reduce costs where possible and use free venues (e.g. members' homes/cafes) where this meets the needs of their group.

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2.0 Gift Aid rules

- 2.1 Member subscriptions are treated as donations to a charity. As such, we can claim 25% for every member who is a taxpayer and consents to Gift Aid their subscription. We can also claim Gift Aid retrospectively over the last 4 years.
- 2.2 However, HMRC¹ will not accept a claim where the donation includes an element of personal benefit. Following discussions with HMRC, at national level, and to ensure the EC remain compliant with the scheme, the advice from Third Age Trust is that the membership subscription distinguishes between basic membership (core activity, for example monthly general meetings) and any other activity, donations for which are not eligible for gift aid (such as interest group meetings).

3.0 Group Meeting Costs (formerly Additional Voluntary Contributions or AVCs)

- 3.1 In reviewing the previous policy, the Committee considered the term AVC confusing, as it suggests that the venue fees paid by a member are voluntary. Attending a meeting at a paid venue is voluntary: paying for the venue is not². This policy therefore replaces the term AVC with **Group Meeting Costs or GMC's for short**.

4.0 Financial Year 6 April 2026 onwards

- 4.1 IGFs should seek to use fee free venues in the first instance. As well as considering members' homes, IGFs should think about in cafes or public houses to keep costs to a minimum. Where this is inappropriate (for example, because of accessibility issues, size of group or because the nature of the group activity does not lend itself to private venues) the IGF can consider paying for a venue. The EC do, of course, encourage all groups to ensure that their meetings are compatible with the needs of all members of our u3a, including those with accessibility needs. This may require changing the venue to allow full participation.
- 4.2 Before committing to any spend, the IGF will need to agree it with the Treasurer to ensure that the EC has a full understanding of costs, that the expenditure is affordable and to agree the appropriate level of subsidy.
- 4.3 In general, where a paid venue is chosen, participating members must pay the appropriate Group Meeting Costs ("GMC's") regardless of whether they attend all the meetings. This is to avoid financial implications for group members should the size of the group change during the year, allowing our members to budget more effectively.

^{*1} His Majesties Revenue and Customs

^{*2} Subject to Committee approval of specific circumstances where it is unreasonable for a member to pay venue costs, e.g. long term illness

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4.4 Groups hiring venues will be able to claim a maximum subsidy based upon their size, as on Beacon on 30th June of each year, using the following methodology:

Size of group	Subsidy available (% of venue cost)
Up to 12	Up to 30%
13 – 20	Up to 20%
Over 20	Up to 10%
Over 40	0%

These percentages are the subsidies that a group can expect to receive: the exact amount of subsidy available will depend on the affordability of the venue/frequency of meeting. The size of the group (and by extension, the percentage subsidy) will be set on 30 June each year³. If a group is experiencing difficulties with the subsidy level, then the IGF should discuss it with the Treasurer (see 4.11).

4.5 If an IGF feels that a member is struggling financially, then a reduced payment may be offered to that individual at the discretion of the IGF though the EC would ask that if possible, that money is made up by the payments made by the group as a whole.

4.6 The IGF should pay the money into the u3a bank account on receipt, or notify the Treasurer, ideally by email, of the sum collected with arrangements to pay it asap.

4.7 The Committee recognise that individual circumstances can have an impact on the ability to pay GMCs in circumstances such as:

- members with limited financial means going to a number of groups which require GMCs;
- a sudden reduction in group membership (due, for example, to illness or caring responsibilities); or,
- new groups without an established membership.

4.8 IGFs are invited to raise issues with the Committee if such situations arise or if the arrangements pose too much of a challenge for an individual member or threatens the viability of their group. The committee will consider any such submission and advise further.

*³ This is to avoid financial implications for group members should the size of the group change during the year, allowing our members to budget more effectively.

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- 4.9 The EC anticipate that the level of GMCs set should allow some flexibility to accommodate such circumstances.
- 4.10 The Committee continues to explore other venues in the area which may offer more affordable options for groups.
- 4.11 If a group requires a greater level of subsidy than set out in this policy the Committee may need to consider if it is financially sustainable and whether the group should continue to be supported under existing arrangements (e.g. frequency and venue).
- 4.12 It is always difficult to accurately predict venue costs over the course of the full year, so to strike an appropriate balance between supporting groups and maintaining subsidies within a manageable level, groups are asked to initially collect GMCs to the end of December at which time the Treasurer will review the position and advise each group of contributions then needed to the end of our financial year, which is 31 March. Please see Finance Policy which includes reporting requirements from Group Facilitators.

5.0 Approval and Review

This policy was approved by the Executive Committee of the Moseley, Kings Heath & District u3a on 29th September 2026 and will be reviewed by the end of September 2029

Signed..... Chair

Signed Treasurer