

South Lakes U3A: Guidance for Group Coordinators

1. Are you thinking of becoming a Group Coordinator?

(1) What is needed?

- Your own enthusiasm and interest in this Group
- A commitment to our U3A ethos
- Facilitating others to make regular contributions or to take a lead on occasions.

(2) Identifying a Joint Coordinator

It is helpful to have an assistant /deputy /joint coordinator. Should you have to step down (temporarily, or long-term), it provides for better transition where there is a shared arrangement. Sometimes there is another 'lead' person who has particular expertise and can make a regular contribution to the group.

2. Starting a new group

Proposals are always welcome from members who are prepared to start up a group. If you are thinking about this, the following points may help you plan ahead.

(1) How many people might be interested?

You can ask for expressions of interest:

- through our Newsletter (published three times a year),
- on our website,
- with an announcement /flier/ form for completion at the Monthly Meeting
- via a new stand /flier at our Annual Open Morning (early September).

(2) Would a start-up meeting help get things going?

It can help to involve another experienced Coordinator at this stage in an early meeting. Explore the nature of the group; how often and where you might meet; a possible time and day of the week, and so on. If the group is quite small it may be preferable to meet initially in someone's home.

Liaise with U3A Room Booking Officers (listed in our Newsletter) for availability and rental costs in Abbot Hall Social Centre, the Shakespeare Centre and for Castle Street. Other venues usually have their own websites with fees and booking arrangements

(3) Ready to start?

Let your potential members know the dates, time and venue for the first meeting.

Inform the SLU3A Groups' Coordinator (Vice Chair), Newsletter Editor and the Website Manager (see Newsletter for their contact details).

3. What next? Contacting and maintaining a list of regular members

Keeping group records and dealing with the admin might be something to ask another regular member of your group to help you with.

(1) Monitoring attendances and recording numbers

You should set up a system for recording attendances at each session /meeting. Some coordinators keep a small log book, asking members to record their names for that (dated) session. Others, particularly for larger groups, use a pre-prepared (and dated) signing-in sheet, where members add a tick or a signature against their name.

It is important to record a total number attending each session, as these figures are then submitted by you to the Assistant Treasurer on a regular basis.

(2) U3A members

Check (annually) that all members are fully paid-up U3A members, either by looking at their membership cards for the current year, or by doing a check via our local database (Beacon).

All U3A members are covered by U3A Insurance for Public Liability. Since non-members are not covered by this they should not be accepted as part of your group until they are fully enrolled members in the U3A.

(3) Managing the group on a regular basis

All members of the SLU3A are encouraged to provide an email address upon registration.

Use of email addresses should make a coordinator's ability to keep in touch with the whole group much easier.

All coordinators are asked to use the bcc (blind carbon copy) facility when sending circular emails to their members. Note, if you are using Beacon to access the email addresses of some or all of your members, that system automatically uses 'bcc' for a group email.

If you are using Outlook, you may find this website helpful:

<https://support.office.com/en-gb/article/Hide-names-and-addresses-in-a-personal-distribution-list-a49b5738-5da1-4f54-9f8b-f1033edce299>

Working in this way means you retain the confidentiality of your members' contact information. There is a **Computing Group** within our SLU3A. It has volunteers willing and able to help any SLU3A members lacking IT confidence and experience.

Contact its coordinator to join a regular drop-in session.

4. A little bit of 'admin': keeping your group's accounts

All established groups aim to be self-sustaining and cover their expenses accordingly. Occasionally, there are equipment hire costs to be shared. At other times, there may be a one-off payment to a key speaker, or transport costs, which must be shared.

Potential members are given the opportunity to try out a group before making a full commitment to join. Members attending from an affiliated U3A in our region need to show you their U3A membership card.

The U3A has advice on the role *Paid Tutors* might, or might not, play in a group. If considering this please see the national document *Paid Tutors*, which includes practical advice and potential problems concerning paid tutors.

Elected members of our committee are, by Charity Law, Trustees of the Charity and responsible for the Charity's money. Elected members should approve all proposed expenditure. The Groups' Coordinator (Vice Chair) is the person who reports to each committee meeting about interest group activities. It is helpful if you can communicate with the Vice Chair, where there is to be a financial commitment e.g. at the stage of deciding on an appropriate venue.

(1) Venue-based groups only – associated room hire costs

Where a coordinator has to make a room booking for a hall or venue that has to be paid for by SLU3A, its group members are asked to contribute a 'session fee' (sometimes called an 'attendance fee') that will go a long way towards the cost of room hire. As coordinator you do need to know the overall cost of the room hire and raise awareness amongst your group members of this cost. Groups can take steps, if necessary, to find a cheaper alternative, or perhaps to meet a little less often.

For each venue-based group a 'session fee' is set each year by the Treasurer, in agreement with the SLU3A committee. This fee can therefore vary, according to actual numbers attending and the costs of the room hire, as well as in relation to the way your group chooses to organise itself.

The aim is for each group to cover the set session fee. Some coordinators prefer to collect these fees in advance, say for a block of 5, or even 10, sessions. Our committee does review the fee structures on an annual basis.

Some groups may ask their members for an additional smaller amount, to cover refreshments / photocopying, for example. It is best to keep these monies separate from any session fees that you have to collect; it also allows the group to have a small 'float' to cover incidental expenses.

Cancellation of any unwanted room booking is your responsibility. Unfortunately rent has to be paid even if the room is unused for a meeting.

(2) Groups with no regular venue costs

These may be home-based groups, or ones that meet off-site for Walking, Gardens, or other outings.

Some groups do not require the rental of room at all (Walking Groups, for example), and may offer their members the chance for a regular contribution to a Mountain Rescue Team collection box instead. Car-sharing (or the use of public transport when possible) is also encouraged and can help to keep down costs for these groups.

(3) Passing your session (attendance) fees to the Assistant Treasurer

As coordinator you get notice to submit the collected money and pass this to the Assistant Treasurer at regular intervals by a due date. You can do this more frequently, particularly should the collected amount reach around £100.

At the same time the numbers signing in to each session should also be submitted (names are not needed). However, it is advisable to keep track of attendance by each member; this may be helpful when reviewing annual attendances, and particularly where you have to manage a Waiting List.

(4) Keeping records of all financial transactions

Full transparency requires all of us to keep a list of income from the session subs, any additional expenditure, receipts and outgoings.

Coordinators should not expect to carry expenses for equipment, materials, incidental costs of a guest speaker. The group members should be providing payments in advance for deposits or associated costs for any event they agree to take part in.

5. SLU3A Newsletter and Website

A SLU3A Newsletter is published three times a year. As coordinator you are invited to submit a short report to each edition to highlight what goes on in your group. You may wish to

- provide a contact point
- record progress and key moments; signify key dates and events (in the next 4-month period)
- advertise for new members, or for the formation of another (related) new group

Our Website Manager takes information from the Newsletter for inclusion on our web site. Our open-access site is found on:

[https:// www.southlakesu3a.org.uk](https://www.southlakesu3a.org.uk)

Coordinators are asked to check periodically that details for their group are up-to-date and accurate. Any new 'postings' for a group or for 'News Flash' can be passed directly to the Website Manager.

6. Annual Coordinators' Event; making suggestions for Coordinator Meetings

An annual event, the Coordinators' Afternoon Tea gives an important opportunity to thank coordinators for all their hard work and enthusiasm. Without a coordinator and some good supporters, a group cannot function. It also provides a social occasion for

coordinators to meet each other, compare notes, and possibly find solutions to particular problems in an informal gathering.

Additional meetings can also be organised where you may wish to raise pressing problems or topics of general interest. Do approach the Vice Chair as well, if you wish to meet for a specific reason relating to your group. A 'suggestions box' for your use is usually available at the Monthly Meetings.

LINKS

South Lakes U3A

Policy Documents and Forms <http://www.southlakesu3a.org.uk/documents.php>

South Cumbria U3As

Comprehensive list of Groups

<https://u3asites.org.uk/files/g/grange/docs/interestgroupsinlocalu3asnov2018.pdf>

National U3A

The Third Age Trust <https://www.u3a.org.uk/>

Paid Tutors

<https://u3asites.org.uk/files/s/south-east/docs/paidtutorsrecommendationsnec.pdf>

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