

BARNSELEY AND DISTRICT



COORDINATORS GUIDELINES

COORDINATORS are the life blood of our U3A. On behalf of all our members – THANK YOU!

What is the main role of a Coordinator?

- To run the group in line with local and national U3A policies and objectives
- Delegate where you can and spread the load
- Identify a deputy to stand-in when the Coordinator is not available
- To maintain the Group's records in the Beacon System (if it is not possible for the Coordinator to work with Beacon, a deputy should be appointed to fulfil this task).

Who provides support to Coordinators?

- Development Officer and other Committee members
- Coordinators Quarterly meeting
- U3A national website: www.u3a.org.uk. Subject Advisors are available with resources
- Third Age Matters magazine (subscription)
- Other information is available from the Business Secretary

What specific tasks do Coordinators have to do?

- If you are responsible for selecting a venue, ensure it is practical for purpose, consult the risk assessment checklist Advice Sheet 1. Copies can be obtained from the Business Secretary or the www.u3a.org.uk website.
- Check with the Development Officer as to your responsibilities for the security of the venue – especially if you are the key holder.
- Ensure you have contact details of the venue in case your plans change, you need advice or if you need to inform them of problems (please ensure you also inform the Room Bookings Secretary).
- Keep a record of members joining and attending the group – names, telephone number, email address – and respond to Committee requests for information on numbers.
- **Non-membership attendees. BU3A is a members only organisation. Coordinators should be aware that non-members/prospective members are allowed to attend only one group meeting prior to becoming a member.**
- The Blue Box should, ideally, be handed in at the blue box desk at the monthly meetings, at least every 2 months. A receipt will be issued for monies received. If the Coordinator is unable to take the Blue Box themselves, they can appoint a group member to do the task instead.
- For the purchase of tea/coffee or other items of limited expenditure, a small charge to cover costs is acceptable.

What other tasks do Coordinators have to do?

- Agree with your group a programme of activity, adapting this as and when necessary.
- If appropriate, agree with your group members any ground rules by which to operate the activities of the group.
- Comment on and confirm any proposed calendar of BU3A meetings for the next quarter, and let the Room Bookings Secretary know – in good time – of any necessary changes to the agreed programme.
We do not want to pay for rooms we do not use.
- Remind members, if you are doing a physically active activity, that they undertake it at their own risk.
- If you are leading walks, ask the Development Officer for a copy of the Walk Leader Checklist.
- If appropriate to your activity, ask the Business Secretary for a copy of Advice Sheet 10 on Licences, which covers photocopying, recorded music, DVDs/videos and performance. Copies of the Licences can be provided if requested.

What financial information do Coordinators need to know?

- The Trustees on the Executive Committee are ultimately accountable for ensuring good practice in money matters. There is an assumption that any funds collected by a Group (other than Blue Box monies) will be used for the purposes agreed by that Group. Depending on the nature of that Group, Coordinators may wish to maintain their own financial records. Unless problems arise, the Executive Committee will not require the formal submission of group financial statements.
- Be aware that the BU3A insurance policy places limits on its cover for the loss of money. You are strongly recommended to avoid the accumulation of Group cash funds that exceed £150. This could happen if you are arranging a special event, eg coach trip. You are strongly advised to consult the Treasurer if significant group funds accumulate.
- You are strongly advised to avoid, if at all possible, the use of your own bank account/credit card for the settlement of Group bills. If significant costs are planned, eg purchase of theatre tickets, please discuss with the BU3A Treasurer the management of such costs and payment arrangements before any contract is agreed.
- Every Group should have access to a Blue Box for members to make their £1 contribution to the organisation's running costs, including room hire, equipment and communications. Blue Boxes should be passed to the Treasurer, or their team, at least every 2 months. On no account should Blue Boxes be opened before handing over to the Treasurer.

Coordinators new to their role may wish to clarify any issues with the BU3A Treasurer.

Beacon System

U3A Beacon is an online facility for managing local U3As, particularly with regard to membership, finance and groups. It is located at <https://u3abeacon.org.uk> and is accessed by username and password, allocated by each U3A Site Administrator.

Your current Site Administrator is Ernest Bradley or Jacqui MacKinnon.

What tasks do Coordinators have to do in the Beacon System?

- Inform the Beacon Administrator when setting up a new group
- Populate your group on the Beacon System
- Communicate with your members through Beacon
- Add members to your group
- Remove members from your group
- Inform the Membership Secretary if a member of your group has passed away
- Update your venue and date/time schedule
- Be mindful of the need to protect members' personal details in line with GDPR guidelines

What meetings do Coordinators need to attend?

- It is useful if Coordinators attend the Monthly Meetings – usually the first Monday of the month. They may then update members on their plans and talk to new members who may be interested in joining a group.
- Quarterly meetings are arranged by the Vice Chairman to which all Coordinators, or their deputies, are invited. Coordinators use these meetings to share news, and comment on other developments within Barnsley U3A.
- Coordinators can use either meeting to hand in their Blue Boxes.

Problems

- Ascertain, discreetly, if any members have any specific conditions that are pertinent to their health and any necessary contact information or actions that may be required.
- Remember personal accident insurance cover is NOT provided by the Third Age Trust.
- If damage is caused to property by a member of the group, take full details as it may, in future, be the subject of an insurance claim.
- Should you have a difficult member who is regularly impacting on other members of the group, speak to the Development Officer for advice.