



Co-ordinators' Guidelines 2022

Revision 1

Blackwater u3a Committee

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Co-ordinators' Guidelines

Please note this Version replaces all earlier Versions

Thank you for deciding to co-ordinate an interest group. In my mind you are without doubt the cornerstone of our u3a. Without your support and hard work it would be impossible to run a successful u3a, which Blackwater definitely is.

On taking on this role please remember you are not on your own, there is help always at hand. The first line of help is these guidelines, but if the answer is not there contact the Groups Co-ordinator who, if they don't know, have the committee and the National u3a team to help them and you find the answer.

Thank you again for taking on this important role which I hope you will enjoy and I am certain will give you a great deal of satisfaction.

Best Wishes
Roger Smith
Chairman, Blackwater u3a

1. Introduction

This booklet is designed to support and inform Interest Group Co-ordinators and group organisers in their quest to create new interest groups and to run existing groups. The Third Age Trust's publication 'Interest Groups' dated January 2016 and the Blackwater u3a Co-ordinator Guidelines 2010 and 2016 have provided the resource material for this booklet.

If you have any questions or something isn't clear, please speak to the Groups' Co-ordinator.

2. Getting started

To start up a new group, first put the idea to the Committee via the Groups' Co-ordinator. If approved, the proposed group can be introduced to members at a monthly meeting, and a notice displayed at the meeting, in the Newsletter and on the Blackwater u3a website.

A signing up sheet will be provided by the Groups' Co-ordinator so that potential group members can leave their contact details. An informal meeting can then be organised for a get-together to discuss how the group might work. If you need to book a venue, it should be booked in the name of Blackwater u3a.

3. Initial meeting agenda

Possible items for discussion at the first meeting could include:

- What do we want to do?
- Who will lead the group? Elect a Co-ordinator and deputy but, perhaps, get individual members of the group to organise specific meetings.
- Where shall we meet? This can be in a member's home or in a room or hall.
- When do we want to meet? How frequently and for how long? Where possible, try to avoid clashes with other groups' dates.
- Refreshments, who will supply them?
- How much will we need to charge members to cover our costs? Always allow a bit extra to cover unforeseen expenses.

4. Tasks to do

- Create a list of members' names, phone numbers and other contact details. You can either do this manually or you can use the Beacon u3a database. Please see Paragraph 16 for more information on the Beacon system.
- If you have disabled members in the group, think about what assistance or special facilities they may need.
- Book the venue
- Set programme for first 4 or 5 months
- Book speakers (if appropriate)
- Keep a record of income and expenditure (See Paragraph 10)

5. Venue options and booking arrangements

Several venues in the Maldon area have rooms to hire, including some in pubs and cafes which are free if everyone buys a coffee! Maldon Library also has meeting space available, free of charge, to local organisations including u3a Groups. Contact the Library for details.

West Maldon Community Centre has two rooms available for groups of up to 24. For room hire at the Centre, contact the bookings secretary on 0300 011 1995 or by email on bookings@wmcc.org.uk. Once a booking has been made, inform the Treasurer who will sign the contract and will make arrangements to pay the invoices. The WMCC caretaker will supply a magnetic key fob for unlocking the front door. The fob should be kept by the co-ordinator. If lost, please advise bookings secretary immediately. Room hire costs will be debited to the Interest Group funds.

6. Types of Group

There are various types of groups. Some are very close knit where members will attend regularly, such as a language course. Others are more informal and cover a variety of interests where some of the members will always turn up and others will only attend if the subject matter on the day interests them. In these loose groups it can be difficult deciding who is and who isn't a member of the group!

The groups may be 'tutor led' where an expert is required (see section 9). They may also be led by the Co-ordinator if they have sufficient knowledge of the subject or by one of the group members. Sometimes a speaker may be booked to cover a particular item of interest.

7. Joint groups/visits with other u3a groups

If you find that you do not have enough people to make the group viable, please bear in mind that we are part of the 'Maldon Cluster' (Maldon, Heybridge, Limebrook, Blackwater, Burnham-on-Crouch, Dengie, Crouch Valley and South Woodham Ferrers u3a groups) and it may be useful to form a joint group with one or more of them. Contact details will be found in the monthly Newsletter. If you are organising a trip and need to fill the coach, you can contact the secretaries of the other Maldon groups to request that the trip is advertised in their Newsletter or at their monthly meeting.

8. Non-members and members of other u3a groups

It has been agreed by the Committee that non-members may come to monthly or group meetings as a visitor or guest. However, this is limited to two attendances after which they are expected to join as a member. The eight groups in the Maldon area have also agreed that members of other u3a groups are welcome to attend their Interest Groups. However, there will be situations when the number of members has to be limited, for example, if meetings take place in a member's house. The final decision on whether to limit the size of a group rests with the Co-ordinator. If there is a waiting list, Blackwater members should be given priority over members of other u3a groups. Disabled members may bring a carer to an event. The carer does not have to be a u3a member.

9. Paid tutors

The ethos of u3a is that groups should be organised 'for the members by the members'. No u3a member should ever receive payment for their time. However, there are situations where it is necessary to hire a paid tutor, either for Health and Safety reasons (eg. keep fit) or because the group wants to progress beyond the knowledge level of the existing group members (for example, language groups). If you do decide to hire a tutor, it is important to check that the tutor is registered as being self-employed for Tax and National Insurance and that the tutor has Public Liability Insurance – the u3a insurance policy does not cover groups being taught by a professional tutor.

10. Finances, cash handling and expenses

Co-ordinators should refer to the Treasurer for clarification and guidance if uncertain about a procedure/process.

In general, all groups income/expenditure should pass through the Blackwater u3a accounts. Small amounts from cash balances held by Co-ordinators may be used provided the event summary clearly shows the income/expense for such event(s).

Examples:

1. *Deductions for costs for teas/coffees etc. can be deducted from event collections with the net collections paid to the Treasurer with an appropriate summary to be provided of income/expense & receipts.*
2. *Payments for Meals such as Luncheon Club/Xmas Dinner events - typically deposits for such events should be collected and paid to the Treasurer, who then pays the Group Deposit for the event - please ensure a Payment Request is sent to the Treasurer.*

Luncheon Club/Xmas Dinner events - payment for the balance on the day to the venue will be expected to be paid at the time by those members attending the Event. The Treasurer does not need to be provided with details of these final payments.

Co-ordinators should keep a record of income and expenditure as this information will be required by the Treasurer. It is recommended that Co-ordinators keep a copy of any forms submitted to the Treasurer for their own records.

Payment Received/Collections

Monies collected for events should be forwarded by Co-ordinators to the Treasurer with a fully completed **Payments Received (Form B)**.

Please check that all cheques are made payable to “**Blackwater u3a**” and are signed and dated.

Use of Online Banking

Members may make payments directly to the bank account(s) of Blackwater u3a for Membership Fees or events. The Bank details will be available within forms or noted within the monthly Newsletter. Members should use the 'reference' field to clearly identify the relevant event, e.g. 'History' 'Theatre' etc.

Payment Requests (Bank Transfer)

Co-ordinators requests for Payments for Events may be made by E-mail to the Treasurer with the following information:

- Copy Invoice/Booking Form/E-mail setting out the payment to be made.
- Full details of the Payee with the Sort Code and Account Number.

Payment Requests (Cheque)

Payment **Request Form C** should be completed and sent to the Treasurer. This can also be sent as an attachment to an e-mail. Provide the Treasurer with the appropriately addressed and stamped envelope to post the cheque to the recipient.

Payments – Other Comments

Invoices for venue bookings at West Maldon Community Centre (**WMCC**) will generally be sent to the Treasurer directly by WMCC. Co-ordinators should advise the Treasurer in a timely manner if

bookings made are subsequently cancelled/not required.

Payments by personal cheques and/or debit/credit cards should not be made by Co-ordinators.

Receipts for Payments

Please ensure any receipts are provided to the Treasurer for accounting purposes.

Copies of e-mail receipts should be forwarded to the Treasurer.

Co-ordinator Expenses

Co-ordinators may claim out-of-pocket expenses to cover items such as paper/stationery/postage. These should be claimed using **Form D**. Co-ordinators should check with the Treasurer for the current expenses rates.

Guidance on Returning Members Monies

The general rule-of-thumb is that members who drop out of events will not be reimbursed where costs have been incurred for items such as coach hire or tickets purchased.

Exceptions might include:

- Where the person dropping out (or the co-ordinator) manages to find someone else to take their place;
- where the trip is by car-share or public transport and where the venue only require payment for those attending on the day.

Co-ordinators should discuss issues of sensitivity with the Treasurer to see if a practical solution might be achievable but this will generally only be in exceptional circumstances.

In the event of cancellations of events beyond the control of Blackwater u3a, the Treasurer and the relevant Group Co-ordinator will liaise to manage the return of funds to members.

Guiding Principles on Group Balances

The Treasurer will maintain a ledger for Individual Groups.

Payment requests will only be processed if there are sufficient funds within the ledger for the Group concerned. Events organised by the Groups are expected to operate as close as possible on a break-even basis.

Some events may benefit from free tickets/Group discounts. It is recommended that you advertise events at the full price. It is easier to return money than have to collect extra monies on the day of an event!

Group Co-ordinators may use their discretion to use retained balances held to subsidise events but should be mindful that all members of their Group are treated fairly. The Treasurer will notify Committee/Co-ordinators if it is felt that balances held in a Group are too high and work with Co-ordinators to rebalance the position.

11. Visits and travel options

Some of the most popular events are organised visits to historic buildings, gardens, theatres and museums. Travel to these locations may be by public transport, hired coach or car share. For groups of less than 30, car share is often the easiest and cheapest option. However, it is important to make sure that you have enough volunteer drivers and that their insurance covers them for carrying passengers who are contributing towards the cost. Most insurance policies cover drivers in this situation but only if the payment is strictly to cover costs. You will not be covered if the payment exceeds the costs. Blackwater u3a has a fixed table of costs, based on the distance travelled. For details, please speak to the Groups Co-ordinator. If you are booking a coach for a long trip, try to get one with an on-board toilet! Don't forget our disabled members – Arrow Taxis (01621 855111) and DaRT (01621 874410) both have vehicles suitable for wheelchairs but please book early to ensure availability. When putting out sign-up sheets for a trip, try and include as much information as possible. For example: method of travel, cost, toilet/refreshment stops and car parking arrangements.

12. Advertising your group

There are a number of channels where your group's future activities can be advertised:
Newsletter reports: To provide information about forthcoming events, Co-ordinators are encouraged to arrange for a short report to be written for inclusion in the monthly Newsletter. Reports should be sent to the newsletter editor by the date given in the previous Newsletter.

Monthly meetings: Have a group display at each monthly meeting, showing what the future plans are and have a sign-up sheet for each event, allowing all Blackwater u3a members to indicate their interest in particular events. You can also speak during the monthly meeting to give details of any forthcoming events. Speak to the Groups' Co-ordinator if you would like to be allocated space for displaying signing-up sheets, or a group notice board.

Group meetings: Display the same signing-up sheets at group meetings as used in the monthly meetings. This will assist in assessing the viability of a trip and can also double up as an attendance register and check sheet for event attendance payments.

The Blackwater u3a website: Please send details each month of your planned activities to the Web Manager so that they can be added to the website. Alternatively, you can add them to the website yourself.

13. West Maldon Community Centre

Security and car parking arrangements

- When hiring a room at West Maldon Community Centre, please carefully read the terms and conditions on the reverse of the booking form. A copy of these is available from the WMCC website.
- Complete the hiring agreement and send it to our Treasurer for signature.
- If you are the only occupants of the Centre, please secure the front door. When leaving, check that no one is still in the building (including the toilets!) and lock the door behind you. If you aren't sure of procedures, check with the Groups' Co-ordinator.
- Complete the first aid books at the Centre to record all incidents and accidents. They can be found in the kitchen drawer or in the first aid cupboard by the main front doors.
- If arranging coach trips it is often possible for members to park their cars towards the far end of the car park. Please contact the booking officer well in advance to establish if the car park will have spare capacity on the day of the trip.
- NB. Please note that the car park gate may be locked at weekends or in the evening. Check with the Community Protection Officers' Department on 01621 852475 or mobile number 07771 935 330 which can be used in case of delay in getting back to the car park after a trip. The caretakers should also be notified of any trip where cars may be left until after the hall is no longer in use that day.

14. Insurance

The Third Age Trust holds comprehensive insurance which provides cover for all u3a members against a wide variety of risks. The most important of these are:

- Public liability cover for u3a event organisers, should they be found to be legally liable for the accidental injury or death of any person. Public liability insurance does not cover pure accidents where no legal liability has been established.
- Accidental loss or damage to property not belonging to you
- Loss or theft of u3a cash in transit or held in a member's house
- Loss, theft or damage of u3a equipment
- Damage to a member's house or property when being used for a u3a event
- Legal liability of a Trustee for losses incurred when carrying out the duties of a u3a Charity Trustee

The Third Age Trust also provides 'Tour Operator Liability' cover for members organising short study trips involving an over-night stay. Longer trips or holidays should be organised through a bonded travel agent. For more details please contact the Secretary.

15. Presentation equipment

Blackwater u3a owns a range of display equipment which is available for any member to borrow. The main items are:

- Two laptop computers, both with Windows 10 and MS Office
- Amplifier and speakers for use with above computers
- Small projector for presentations to groups of up to 30 people.
- High-powered projector for use in large halls
- Portable projector stand
- Portable projector screen (x2)

If you wish to book any item, please contact the Equipment Manager.

16. Blackwater u3a database

The Bu3a membership database is held within the national u3a Beacon management system and securely holds comprehensive information on all members and may be used by authorised members to maintain lists of group members and send emails to selected members. Please contact the Database Manager for information and guidance about the system which is fully online. Beacon also has a comprehensive User Guide and a Help Desk.

For information on Data Protection, please see our Data Protection Statement, which may be downloaded from the Blackwater u3a website.

17. Monthly meeting set-up and refreshment rotas

The main Blackwater u3a monthly meeting depends on teams of volunteers to help with the setting up and putting away of tables and chairs, refreshments and 'meeting and greeting' new members. To make this fairer for everyone, a rota has been set up and maintained by the Groups' Co-ordinator and each month two groups will be asked to provide volunteers to cover each activity. In practice, this means each group will only need to cover each activity once every nine months. Those groups responsible for the next three month's meetings will be shown in the Newsletter

18. Contact Lists

It is recommended that a Group or Trip Leader carries a list of contact numbers for all members travelling to an event or outing. This will be useful for contacting members' friends or family in the event of an accident or medical problem. It will also provide a way of checking the whereabouts of any trip member who is 'missing' at the stated departure time.

19. Risk assessments, First Aid and accident forms

When organising an event, be it a trip or a social event involving some levels of movement, consider the risks to the members likely to be attending. Can they, say, climb a spiral stair case, walk on slippery paths, or walk a few miles. Consider evacuation points in case of injury. For further guidance, please read the u3a Risk Assessment forms. In an emergency situation, it is not expected that any of us will do anything other than take reasonable, safe, common-sense actions. However, if your group takes part in sports or outside activities, it is recommended that you take a First Aid kit and that at least one member of the group has First Aid knowledge. Should an accident or emergency incident occur during an event or trip, then the Co-ordinator or person leading the trip should complete an Accident Form and send it the Groups' Co-ordinator as soon as possible after the event. Forms may be obtained from the Groups' Co-ordinator or downloaded from the Blackwater u3a website.

<u>Blackwater u3a – Car Share Costs</u>	
Round Trip distance	Cost*
0 – 16 miles	£2
17 – 26 miles	£3
27 – 36 miles	£4
37 – 46 miles	£5
47 miles and over	At Co-ordinator's discretion
Maldon to Chelmsford set rate	£3
Maldon to Colchester set rate	£5
Maldon to Southend set rate	£5
*Costs are per person, regardless of the number of people in the car	