

## Crawley u3a Trustees Induction with Checklist (15<sup>th</sup> November 2023)

### Timing

It is recommended that the actions listed on the attached checklist are undertaken over a period of weeks so that the new Trustee can absorb their learning and to reflect upon it. The meetings with other Committee members are more useful once the new Trustee has attended at least one Committee meeting.

### Responsibilities

It is the Chair's and Secretary's responsibility to ensure that the induction process is followed and to organise the signing and retention of the documents referred to under 1(a) and 2(c). However, it is the inductee's responsibility to ensure they are as fully prepared as possible for their Trustee and Committee Role.

### Sources

Based partly on the u3a Trust Trustee Induction (updated November 2022) on [u3a Trust advice](#) but with additional items to clarify certain matters and to reflect Crawley u3a's processes.

[Blue text](#) indicates a Crawley u3a document, to be found on the Crawley u3a website page indicated:

	Action	Note	Check
<b>1</b>	<b>Becoming a Charity Trustee: Charity Commission Requirements</b>		
	(a) Sign the Trustee eligibility form confirming your suitability (Secretary to retain)	(1)	
	(b) Read the Charity Trustee Welcome Pack	(2)	
	(c) Read "The essential trustee – what you need to know" [Secretary & Treasurer only]	(3)	
	(d) Read the 5 minute Guides for Charity Trustees	(4)	
	(e) Try the Quiz to test your learning	(5)	
<b>2</b>	<b>u3a Third Age Trust Requirements</b>		
	(a) Read "Essential Information for all Crawley u3a Members"	(6)	
	(b) u3a Trustee Responsibilities	(7)	
	(c) Trustees Code of Conduct (a copy needs to be signed and dated for the Secretary)	(7)	
	(d) Terms of Membership of the Third Age Trust	(7)	
	(e) Understand the Charity Trustee Management Liability Insurance Cover	(8)	
	(f) Consider taking the online workshop "Running your u3a – Information for Trustees"	(9)	
<b>3</b>	<b>Crawley u3a Committee</b>		
	(a) Be aware of contents of the <a href="#">Crawley u3a Trustees Handbook</a>	(10)	
	(b) Review the most recent <a href="#">Crawley u3a Trustees Task List</a>	(10)	
	(c) Be aware of who holds each Committee & Support Post ( <a href="#">Contacts</a> page on website)		
	(d) Be aware of all the current <a href="#">Crawley u3a Policies and Documents</a>	(10)	
	(e) Meet with your predecessor to undertake a handover		
	(f) Meet with other members of the Committee on a one-to-one basis, to learn about their roles and to hear any ideas they may have for your role		
	(g) Meet with any support roles for your role, if any		
	(h) Peruse the agendas, papers & minutes for the last three Committee meetings	(11)	
	(i) Be aware of what types of expenses you can reclaim, and how you do this	(12)	

	Action	Note	Check
<b>4</b>	<b>Access to Crawley u3a systems and tools</b>		
	(a) The Chair or other Trustee administrator for the Crawley u3a Trustees Whats App group will contact you so that you are included		
	(b) Contact <a href="mailto:webmaster@crawleyu3a.org.uk">webmaster@crawleyu3a.org.uk</a> to set up:		
	(i) <a href="mailto:xxxxx@crawleyu3a.org.uk">xxxxx@crawleyu3a.org.uk</a> web address (if desired)	(13)	
	(ii) Website editor rights (if relevant to role) and for SiteBuilder training		
	(c) Contact the Beacon Administrator to arrange access and training	(14)	
	(d) Contact the Communications Coordinator to gain post access to the public Crawley u3a Facebook page <a href="https://www.facebook.com/groups/Crawleyu3a">https://www.facebook.com/groups/Crawleyu3a</a>	(15)	
<b>5</b>	<b>Finance</b> (if you are to be an approver of expenses or payments) contact the Treasurer to:		
	(a) Ensure that bank's list of signatures (mandate) is updated		
	(b) Be aware of the Crawley u3a Group Leaders regulations		
<b>6</b>	<b>Familiarisation with the Third Age Trust's website and information</b>		
	(a) Be aware of all the Advice & Guidance documents available under <a href="#">u3a Trust advice</a>		
	(b) Sign up to the Trust's Monthly Newsletter mailing list using the form on the News-Newsletter page (see <a href="#">Annex 2</a> )		
	(c) Be aware that the regular mailings to Chairs, Secretaries and Treasurers are listed under Support for u3as-Mailings		
	(d) Explore the Trust's website generally (things are not always where you expect them to be) including the "About us" and "Fit for the Future" (under News) sections.		
	(d) Go through <a href="#">Annex 1</a> & <a href="#">Annex 2</a> and decide if you need to be signed up to any other u3a communications or Facebook groups.		

## Notes

**Charity Commission** Main website <https://www.gov.uk/government/organisations/charity-commission>

- (1) <https://www.gov.uk/government/publications/confirmation-of-charity-trustee-eligibility>
- (2) <https://www.gov.uk/government/publications/charity-trustee-welcome-pack>
- (3) <https://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3>
- (4) <https://www.gov.uk/government/collections/5-minute-guides-for-charity-trustees>
- (5) <https://charity-commission.involve.me/trustee-quiz-5-minute-guides>

## u3a Requirements

- (6) See "New Members Welcome" on the Crawley u3a website Members page
- (7) Included in "Essential Documents for Trustees" on the Crawley u3a website [For Trustees](#) page (accessed via the link on the [Documents](#) page)
- (8) Read Section 3(d) in the [Insurance Guidance](#) on Crawley u3a website [Documents](#) page
- (9) See the main u3a <https://www.u3a.org.uk/advice/workshops>

**Crawley u3a Committee** (references to the Crawley u3a website)

- (10) On the Crawley u3a website [For Trustees](#) page (accessed via the link on the [Documents](#) page)
- (11) On the Crawley u3a website [Committee Meetings](#) (accessed via the link on the [Documents](#) page)
- (12) Covered in [Financial Policy & Financial Policy – Delegated Decisions](#) on the [GroupLeaders](#) page

## Systems and Tools

- (13) Note that not all Committee Members use an [@Crawleyu3a.org.uk](mailto:@Crawleyu3a.org.uk) generic account and some web-browsers do not support it.
- (14) More information on Beacon on <https://beacon.u3a.org.uk/>
- (15) Currently in [Procedures & Reference Guide](#) on the Crawley website on the [GroupLeaders](#) page

## Annex 1: Contacting the Third Age Trust

Website <https://www.u3a.org.uk/>  
 Address The Third Age Trust, 156 Blackfriars Road, LONDON SE1 8EN  
 Tel 0208 466 6139 Open Mon – Fri 9:30 – 16:30

<b>Registration</b>	
To register to access the <u>Support for u3as</u> menu items	<a href="https://www.u3a.org.uk/my-account">https://www.u3a.org.uk/my-account</a>
General queries to the u3a (on policies to follow etc)	<a href="mailto:info@u3a.org.uk">info@u3a.org.uk</a> or by form on <a href="https://www.u3a.org.uk/u3a-national-office">https://www.u3a.org.uk/u3a-national-office</a>
To update contact details for Trustees (Secretary's task)	<a href="mailto:database@u3a.org.uk">database@u3a.org.uk</a>
<b>Submission of Questions</b>	
Questions about governance of the u3a	<a href="mailto:governance@u3a.org.uk">governance@u3a.org.uk</a>
Questions on any of the press releases	<a href="mailto:communications@u3a.org.uk">communications@u3a.org.uk</a>
Questions about Beacon	<a href="mailto:info@beacon.u3a.org.uk">info@beacon.u3a.org.uk</a>
<b>Additional Information</b>	
Focus groups on learning within u3a	Contact <a href="mailto:learning@u3a.org.uk">learning@u3a.org.uk</a>
Finding out more on being a subject adviser	<a href="mailto:subjectadviser@u3a.org.uk">subjectadviser@u3a.org.uk</a>
Guides written by u3a members explaining the various web communication platforms	<a href="https://www.u3a.org.uk/keeping-in-touch-links">https://www.u3a.org.uk/keeping-in-touch-links</a>
Brand Guidelines	<a href="https://www.u3a.org.uk/brand-guidelines">https://www.u3a.org.uk/brand-guidelines</a>
<b>Publicity</b>	
Submission of a story on Crawley u3a to the blog	Form on <a href="https://sources.u3a.org.uk/submit-a-story">https://sources.u3a.org.uk/submit-a-story</a>
To download u3a logos and colours for leaflets & PowerPoint (need to register)	<a href="https://u3abrand.org.uk/">https://u3abrand.org.uk/</a>
Submission of a story on Crawley u3a to the blog	Form on <a href="https://sources.u3a.org.uk/submit-a-story">https://sources.u3a.org.uk/submit-a-story</a>
<b>Other</b>	
To register interest in the u3a Festival 24	<a href="mailto:festival@u3a.org.uk">festival@u3a.org.uk</a>

### Specific contacts at the Third Age Trust

On learning & related topics

Georgia Laws

Governance & constitution matters

Linda Robson

## Annex 2: Third Age Trust Communications

No	Title and details
1	<p><b>Third Age Matters (TAM) magazine</b> <b>For all members who wish to receive it</b></p> <p>Published <u>five times</u> a year and posted direct to members' homes. Contains stories about members and u3a activities, plus celebrity interviews and features on technology, recipes, travel, competitions, and a lively and popular letters section. The cost (currently £4 per annum) is charged directly to the local u3a.</p> <p>Crawley u3a lets members decide whether they wish to receive TAM, in which case they are charged the amount Crawley u3a is charged per individual subscription (£4.00 per annum for 2023/24). New members receive TAM free of charge up to the 31<sup>st</sup> August following the date they joined, so they have the opportunity to decide whether they wish to receive it in future or not. Joint members receive one to share between them.</p> <p>The Members Coordinator submits a database (downloaded straight from Beacon) to the Trust five times a year at regular intervals with the names and addresses of those who receive it.</p>
2	<p><b>u3a National Newsletter (monthly e-mail)</b> <b>For all members who register to receive it.</b></p> <p>This is sent out by e-mail and includes:</p> <ul style="list-style-type: none"> <li>• News from the Trust</li> <li>• References to articles in the media on the u3a</li> <li>• News items from individual u3as</li> <li>• Latest learning initiatives and talks open to all members</li> </ul> <p>Form to sign up to receive this at the bottom of the Trust's website <a href="#">Home</a> page</p>
3	<p><b>u3a mailing (e-mail)</b> <b>For Chairs, Secretaries &amp; Treasurers</b></p> <p>Two types:</p> <ol style="list-style-type: none"> <li>i) <a href="#">AGM 202x</a> Communication on Third Age Trust Trustee (TAT) elections and AGMs</li> <li>ii) <a href="#">General mailings</a>, generally one monthly covering matters such as: <ul style="list-style-type: none"> <li>• Updates on current issues or problems such as the SiteBuilder collapse in Nov 2022</li> <li>• News on TAT publicity campaigns</li> <li>• Latest on learning opportunities</li> <li>• Requests for volunteers for TAT committees and projects</li> </ul> </li> </ol> <p>These should be automatically sent to Chairs, Secretaries and Treasurers once the Secretary has informed the Trust (using <a href="mailto:database@u3a.org.uk">database@u3a.org.uk</a> above) of their details.</p> <p>Past editions can be accessed by all those who have access to <a href="#">Support for u3as</a> (see under Registration in <a href="#">Annex 1</a>) under <a href="https://www.u3a.org.uk/advice/mailings">https://www.u3a.org.uk/advice/mailings</a></p> <p><i>The Secretary communicates anything of relevance to the Committee covered in the u3a mailings in the Third Age Trust section of the Monthly Reports</i></p>
4	<p><b>Finance News Extra (e-mail)</b> <b>For Treasurers but copies can be accessed by all Trustees</b></p> <p>A relatively new newsletter (1<sup>st</sup> edition 5/12/22) automatically sent to Treasurers a few times a year, part of the Trust Board's efforts to improve transparency.</p> <p>Copies can be accessed under <a href="#">General Mailings</a> <a href="https://www.u3a.org.uk/advice/mailings">https://www.u3a.org.uk/advice/mailings</a></p>
5	<p><b>Networks e-mail newsletter</b> <b>For Officer Trustees</b></p> <p>Informs u3a Trustees of <a href="#">Network Link</a> meetings which are held 3 times per year. These meetings where representatives of Networks throughout the UK are invited to hear latest Trust developments and share best practice and ideas on a few main topics each meeting. Network Link meetings are usually attended by the Trust Board Officers, most Regional Trustees, and the Trust's CEO, and so are an opportunity to have direct contact with the main decision-makers in the movement.</p>

	<p>To sign up to receive this see <a href="https://www.u3a.org.uk/advice/u3a-networks">https://www.u3a.org.uk/advice/u3a-networks</a></p> <p>The notes from each meeting and the presentations shown (on topics such as local governance, SiteWorks &amp; Beacon) can be found on this website.</p>
6	<p><b>Monthly Updates on Online Learning Events &amp; National Programmes</b> <a href="#">Updates for members interested in accessing the u3a free online talks, courses, competitions and projects.</a></p> <p>Any member can access the relevant TAT websites at:</p> <p><a href="https://www.u3a.org.uk/events/educational-events">https://www.u3a.org.uk/events/educational-events</a> and <a href="https://www.u3a.org.uk/learning/national-programmes">https://www.u3a.org.uk/learning/national-programmes</a></p> <p>Members wishing to be updated on what is available on a regular basis signing up to the regular e-mail updates via <a href="https://www.u3a.org.uk/events/educational-events">https://www.u3a.org.uk/events/educational-events</a></p> <p><i>There are some worthy material on these sites and I don't think most u3a members are sufficiently aware of them (though we occasionally refer to them in our newsletter).</i></p>
7	<p><b>To receive e-mails on Brand Offers</b> <a href="#">For Trustees/Support Roles dealing with publicity</a></p> <p>Some of these "offers" still seem quite expensive</p> <p>Need to register via: <a href="https://u3abrand.org.uk/auth/register">https://u3abrand.org.uk/auth/register</a></p>

### Annex 3: u3a National Facebook Groups

These seem to be proliferating at the moment and there is some overlap in types of topics covered. Ordered in terms of perceived usefulness to Trustees:

1	<p><b>Chairs Forum</b> <a href="https://www.facebook.com/groups/chairsforum">https://www.facebook.com/groups/chairsforum</a> <i>Independent of the TAT</i></p> <p><b>Aimed at Chairs, plus one other committee member as nominated by the Chair. Currently 214 members.</b></p> <p>A private group set up in July 2023 by a group of u3a Chairs from around the country NOT by the TAT. A forum for chairs of member u3as to share information, views and experience and to encourage a dialogue between u3as and to seek out ideas and opinions. The site is (lightly) moderated and anonymous postings are permitted.</p> <p>The posts and discussions are much franker than those under Fit for the Future, so of more use.</p> <p><i>The Chairs Forum also conducts monthly online meetings.</i></p>
2	<p><b>Fit for the Future</b> <a href="https://www.facebook.com/groups/u3afitforthefuture">https://www.facebook.com/groups/u3afitforthefuture</a></p> <p><b>Aimed at Officer Trustees. Currently 740 members.</b></p> <p>A private group set-up by the TAT in November 2022 (after their disastrous AGM) to discuss the TAT's vision of the future of the u3a. Mainly concerned with governance, finance &amp; strategy but also provides an opportunity to share ideas and experience. Liz Thackray, current Chair of the TAT, posts frequently.</p>
3	<p><b>Let's Talk Tech</b> <a href="https://www.facebook.com/search/top?q=u3a%20lets%20talk%20tech">https://www.facebook.com/search/top?q=u3a%20lets%20talk%20tech</a></p> <p><b>Aimed at Trustees &amp; Support Roles dealing with IT and technical matters. Currently 849 members.</b></p> <p>A private group set up in September 2021. Gives presentations on and discusses IT and technical matters (e.g. using PayPal, types of sound systems). Most of it not easy for a layperson to follow.</p>
4	<p><b>Keeping in Touch</b> <a href="https://www.facebook.com/groups/U3AKeepingInTouch/">https://www.facebook.com/groups/U3AKeepingInTouch/</a></p> <p><b>Aimed at all u3a UK members. Current c7k members</b></p> <p>A private group. Moderated by the TAT Communications Officer Seems to be many bits of news from individual u3as and some other rather trivial content.</p>