Droitwich Spa & District U3A

Group Leaders' Handbook - Part 2

Communicating with Group Members

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Maintaining regular contact with the members of your interest group is an important part of being a Group Leader. You may have been mainly responsible for setting-up and establishing the group that you lead, but really an interest group *belongs* to all of its members as a whole, and each member should, as far as possible, be involved in making decisions about what happens in the group. Mostly, this will be done via face-to-face discussions at group meetings, and by distributing information to group members by email.

1.   Beacon Management Information System

Beacon is a management information system for recording information about members, interest groups and finances of u3as. Beacon was developed by a small group of u3a members, the Third Age Trust supports it, and as of 2020 it is being used by about 400 u3as nationally (and this number is growing). Droitwich u3a started to use Beacon in October 2017, initially by the Membership Secretary, and later by those Committee members who needed access to members contact details. From Spring 2018 Beacon has also been made available to Group Leaders. Droitwich u3a pay a small annual fee for its use based on the size of our membership.

As a Group Leader, you may use Beacon to record information about your group, and perhaps more importantly, record a list of the members of your group. Beacon provides a simple method for adding members to your group - by selecting them from an alphabetical list of members of our u3a, or by specifying their membership number. It also includes a simple method for removing members from your group. However, the main feature of Beacon it that provides an easy way for you to email all, or some, of the group members. You can also check whether those emails have been delivered and read by the recipient. A key feature of all emails sent to members through Beacon is that they are automatically sent Bcc ("blind copy") and so maintain members security. If you regularly send the same sort of email, there is also a facility for storing "standard" email messages so that you don't have to re-type the message every time. A particular advantage of using Beacon as a single source of members' details, is that when a member changes their contact details, their revised contact information will automatically be updated on the list of members of your group.

One of the features of our reciprocal membership scheme is that all Reciprocal Members are also recorded in Beacon, and they can be processed just as if they were normal Droitwich u3a members. This means that you can add a Reciprocal Member to your group, and send them emails in just the same way that you can with Droitwich u3a members.

Beacon is available for use by all Group Leaders and all you need is access to a personal computer or a tablet (such as an iPad) and a web browser (such as Google Chrome, Safari, Firefox or Internet Explorer). Beacon is our u3a's preferred method for Group Leaders to maintain records about their group members. Please contact the Beacon Administrator if you would like to find out more about using Beacon, or if you would like to have some training on how you can use Beacon.

Beacon has many other features that, though not directly available to Group Leaders, help those members of the Committee involved in the administration of group activities. For example, Beacon includes a simple way for the Groups' Co-ordinator, to send an email to all, or some, of the Group Leaders. As another example, it is possible to create different roles for different users of Beacon, so that the Committee can be reasonably sure that, for example, Group Leaders who are Beacon users, can only access and use the personal data of members in a manner consistent with our data protection policies.

2.   Interacting with your Group Members

a)   Keeping in touch with your Group Members

Mostly communication with the members of your group will be via email, and it is acceptable for you to maintain your own email list for such purposes. However, when emailing the whole group, please use Bcc ("blind copy") so as to maintain members security. If you have difficulty in contacting a group member, their contact details may be obtained from the Membership Secretary.

Rather than maintaining your own contact list, you should instead think about using Beacon which provides a simple method for adding members to your group (and removing them if necessary), as well an easy way to email all, or some, of the group members.

b)   Checking the Status of your Group Members

On the 1st April each year the Droitwich u3a memberships are renewed, and members are given one month's grace to renew their membership. Thus, all members should have renewed by the beginning of May at the latest. Just after the start of each new membership year in late April or May, you should ensure that the members of your group have a valid membership card. If you use Beacon, checking membership renewals is straightforward, as those members who have not renewed their membership will appear in "red" on the list of members of your group. It will therefore not be necessary for you to actually see and check membership cards.

c)   Keeping a Record of Attendance

You are asked to keep a register and attendance record, primarily for your own use, but also if requested to provide information for the Committee. The register should include a list of the names of the group members. If you wish you may also record the membership number, and contact details for the group members such as email addresses, postal addresses, and mobile and landline telephone number to facilitate communication. If you use Beacon you should not need to record so much, or in many cases any, contact information (since it will be available on Beacon), but you should still maintain a record of attendance. Unfortunately, there is currently no method for recording group member

attendance within Beacon, and so you will need to keep a separate attendance record. A group member's contact details should not be shared among other members of the group unless permission has been granted, and should be deleted when the member no longer belongs to our u3a.

d)   Seasonal Breaks and other Planned Suspensions

Note that groups do not formally have to close and re-open at the start of each new membership year, unless it is felt that this may resolve a problem with waiting lists. Nor do groups have to suspend meetings for a break (such as a break for summer holidays, or a winter break for groups that meet outdoors) although a number of groups choose to do so; it is up to you and the group members to make this decision. Please do not ask the Website Administrator to remove a group's entry on the website for such periods of suspension, but rather include information about likely or planned periods of suspension in the description of how the group operates.

3.   Maintaining a Waiting List

If a group is full, it is your responsibility to maintain a waiting list for places, and should a vacancy become available, to allocate places from the waiting list on a "first come, first served" basis. There is no need to state whether a group is full or not on the website, but such information should be communicated to the Groups' Co-ordinator, so that it appears in their report in the newsletter. It is also important for the Groups' Co-ordinator to be aware of the demand for a particular area, so that they can judge whether or not another group is needed.

It is also helpful if those on waiting lists can be kept informed at regular intervals of any progress in their movement on the list. Where members have been waiting for a long period to join a group, and no one is willing to set up a new group, the group ought to be re-formed on a voluntary basis in order to give everyone interested the opportunity to take part. Some u3as have a new enrolment system at the start of each membership year, but we do not wish to introduce this in Droitwich u3a unless absolutely necessary.

If you use Beacon, there is a simple method for creating and maintaining a waiting list for your group, and an easy way to email all, or some, of the members on the waiting list - all in a manner identical to the way in which normal members of the group are processed. There is also a simple method for transferring a member from the waiting list to a vacant place in the group.

4.   More than one Group Leader

For larger groups you should consider whether to recruit a deputy from within the group, or appoint a joint Group Leader, to cover absences or to share the load of running the group. As far as possible, you should encourage members to participate in the running of the group as this helps them to have shared ownership of the group. For instance, hosting the group, leading a group session, collecting any monies for room hire, keeping the Website Administrator and Groups' Co-ordinator informed, could all be undertaken by different group members.

If you use Beacon, your group can have more than one Group Leader recorded, and the current Group Leader for a group has the authority to designate another member as a (joint) Group Leader.

5. Using the Website

Most of our members get information about what is happening in our u3a from the website, so please use the website entry for your group to promote it. The website is also where most prospective members find out about our u3a - so in promoting your group you will also be promoting our u3a more generally. Please try and ensure that the website contains up-to-date information about your group, including:

- A consistent and meaningful name for your group.

- Days, times, and frequency of meetings.

- Where the meetings are held.

- Any costs associated with attendance at meetings.

- A description of the purpose of the group, and how it currently operates.
  This description can be as long or as detailed as you like.

- A method for contacting you as the Group Leader.
  If you don't wish to publish your email address and/or phone number directly in the group description, then inform the Website Administrator of your email address and they can set-up the website so that clicking on the "Envelope" icon on the page for your group will generate an email to you without the sender seeing the actual email address.

- Photographs of you and your group's activities are always welcome.

Preferably, the above should be provided in a form that doesn't require it to be changed too often, so try and aim to update your group information about once per year.

You should send such information directly to the Website Administrator. It would be helpful if a copy is also sent to the Groups' Co-ordinator. Please note that it is *not* the Website Administrator's job to act as an "editor" for what you send to them, so please send them information that can just be cut and pasted onto the website page without any changes.

Please do *not* include short-term information about the group. For example, do *not* include information about whether the group is currently full or has vacancies - such information will be part of the report of the Groups' Co-ordinator that is supplied to all members in the newsletter. Also, do *not* include information about whether the group is currently taking a short or seasonal break, or is due to start again on a certain date - such information can be part of the report of the Groups' Co-ordinator in the newsletter, or you can write your own group report for the newsletter. In particular, if a group is taking a short or seasonal break, do *not* ask the Website Administrator to remove it from the website, but rather try to provide a description for the group which includes such information, and is thus valid at whatever time of the year it is read.

6. Using the Newsletter

Droitwich u3a currently produces a bi-monthly newsletter - "Droitwich u3a News" - for circulation to all members on or about the 2nd Monday of each alternate month (ie January, March, May, July, September and November).

The main newsletter is published on the Droitwich u3a website in a "digital" form, and can include text, photographs, links to other websites, etc. Publication involves sending an email containing a link to this publication to all members who have supplied an email

address. Members who do not have access to the internet have a reduced version of the newsletter (with photographs and links removed) printed and posted to them.

Groups are invited to supply articles promoting the activities of their group, or providing short term information about the group organisation including occasional planned cancellations, planned changes of venue, planned periods of extended breaks (eg summer breaks, winter breaks), etc. You should send articles to the Newsletter Editor by the 1st Monday in each month. As there will be at least a one-week delay in the newsletter publication, please do *not* use the newsletter as a way of communicating urgent information to the members of your group.

7.   Group Leaders' Meetings

We aim to have two Group Leaders meetings a year, one in the autumn and another in the spring. This is where issues can be raised and discussed for the benefit of all. It is helpful to the Committee if this can be a forum of positive ideas for how the u3a as a whole can operate more effectively. All Group Leaders will be invited to attend, and it is hoped that all groups can be represented at these meetings. If you are unable to attend, please arrange for another member of the group to attend and represent the group.

8.   And Finally

In many cases, if you need help or if you are in any doubt, it may be easier just to contact the Groups' Co-ordinator, Chairman or Treasurer who will mostly be able to answer your questions and if they cannot, they will find someone who can!

Enjoy your Group Leading! Remember, we only exist through our volunteers!