

## Information for Group Organisers

Groups are the 'lifeblood' of U3A so thank you very much for agreeing to be a Group Organiser. We hope the following notes will help you:

### Starting up:

- Think about whether your group is going to run for a specified number of weeks or run indefinitely
- Think about how much time you want to put into the group; avoid taking on too much
- Decide on a manageable number for your group; if there are too many, start a waiting list. There may be someone in the group who is prepared to start a second group – please let us know
- Decide where you are going to meet, when, for how long and how often. You can decide this, consult with the prospective members by phone or e-mail or you can wait until the first/feasibility meeting. As the Organiser do you want to host the group meetings at your home – or even NOT at your home? Will the numbers be large or do you need special facilities or equipment? This may affect your choice of venue. You don't always have to meet in the same place – you may decide to rotate round members' homes or hold meetings at different locations. Think about access for anyone with disabilities and available parking. The Groups Coordinator has a list of venues of which the Committee are aware
- When considering a venue, bear in mind that some funding may be available for public places that are equipped for disabled access. We have obtained grants from local organisations and businesses to promote inclusivity within the community. The aim is to encourage people who find it difficult to join in with typical group activities. This funding will be limited to the hire of the facility and probably only for the first three meetings.
- At your first meeting, find out what others expect of the group and what expertise they may have to offer. Consider creating a document that sets out the aims and ethos of the group and any rules that you might like to have. This way all those in the group and anyone joining later will know what to expect. The Groups Coordinator has an example 'Aims, rules and guidelines' document that might help
- It is advisable to have an emergency contact number for each group member just in case anything should happen in the group
- Set the rules/guidelines for attendance (if relevant). Should members inform you before each meeting whether they will be attending or not? If there is a limit on numbers consider a 'three strikes and you're out' policy for people who don't attend for a while. (If you do later remove someone from the group remember to update the status of the group from Full to With Vacancies if applicable.)

- When all the above has been decided ask the Web Manager to create a page for the group and provide them with all the information about the Group that you can. Aside from details of what the group is and does, make sure to include the day, times and location(s) of meetings.
- Create a Group in the Beacon database. Add in the basic information about when and where the group meets plus the contact information for the Organiser. Add in all the members of the group as they join. There is a 'how to' document on using the Beacon database available from the Groups Coordinator

### **Data Protection:**

Since you will be holding personal information on each of your members such as telephone numbers and email addresses, it is important that you keep it safe.

If you are contacting a group of your members by email, please follow these procedures and you will be protecting their email addresses:

- Send emails to your group through the Beacon database\* - each member will receive a copy addressed only to them
- If you don't use the beacon database to maintain your Group information, you can use your normal e-mail facility. Put **your** email address in the 'To' box, i.e. you are sending the email to yourself. Put all of your members' email addresses in the 'Bcc' (blind copy) box. This will mean that each member will only see their email address on the email when they receive it. They will not see other members' addresses.

### **Communications:**

- The Group Coordinator's responsibility is to support Group Organisers, and to find new groups and Organisers.
- Once you have had your first meeting, please update the Group information in the Beacon database\* (or tell the Groups Coordinator if you're not on-line or otherwise unable to do this)
- It is your responsibility to manage your group and your waiting list. Please keep a note of your waiting list and keep in touch with those members.
- Please keep the Group information up to date regarding joiners and leavers\*. If you are not maintaining your group details on the Beacon database, please send the information to the Groups Coordinator
- Only members of U3A can attend the group since this will ensure that your group is covered by insurance. If someone wants to attend who is a member of another U3A, they need to join our U3A minus the capitation fee (i.e. £8.50 instead of £12.00). This arrangement has been agreed with all neighbouring U3As
- Your members' details and their contact information are available to you in the Beacon database\*. If you don't use this to maintain your group information, keep a note of your members and their contact details. Please keep this information safe!

- It is U3A recommendation that members are charged 50p for tea/coffee and biscuits if provided at the meeting
- Whenever you can, provide the monthly Newsletter with information about what your group is doing – with photographs if possible. You may wish to appoint someone in your group to take on this role which will allow you to concentrate on your subject. Mary Solway compiles the Newsletter and her email address is [newsletter@exmouthu3a.org.uk](mailto:newsletter@exmouthu3a.org.uk)
- Keep your group information on the Exmouth U3A Website up to date. Marion Ricketts is responsible for the website and is always willing to put your group information on the website. She has, also, provided a guide on how to update your web page yourself. If you wish to do this, you will need to get a password from Marion, whose email address is [website@exmouthu3a.org.uk](mailto:website@exmouthu3a.org.uk)
- If anyone is unwell or has an accident at a meeting, make a note of the details and advise the Groups Coordinator as soon as possible. He/She will provide you with an Accident Form if it is needed.

#### **Finances:**

- U3A is a charity and does not have funds available to members. Therefore, if your group needs to spend some money, the group members must share the costs between them
- If you need to hire a venue or a coach, this should be done through the Exmouth U3A Treasurer. There is a cheque request form to complete for this. You will need to obtain an invoice from the venue/coach company marked 'Exmouth & District U3A' and this should be sent to the Treasurer. You should collect and keep a record of the payments from your members which must total the amount of the invoice. Payments from members should be by cheque, not cash, and made payable to Exmouth & District U3A. The cheques should be sent to the Treasurer with the invoice
- If car sharing, then the recommendation is: 25p per mile per car
- In respect of the payment of invoices authorised by a Group Organiser and supported by equivalent payments to the U3A from the Group Organiser, a maximum of £250 on any one occasion is allowed or a higher amount by prior agreement with the Treasurer or her/his deputy
- In respect of expenditure requested by a Group Organiser for booking performances, accommodation or transport, no such expenditure shall be committed in advance of a cheque being issued for a corresponding amount drawn on the U3A bank account (see below). Group Organisers may negotiate **provisional** bookings with suppliers provided that the provisional nature of the arrangement is made clear to suppliers and that no liability for cancellation fees could arise
- If you build up funds in your group (e.g. for monthly payment of venue), you can put this in the U3A bank account – please contact the Treasurer.
- As a general rule, payments will not be made to tutors for groups. If you are considering using a tutor, for example for an exercise group, please contact the Groups' Coordinator before proceeding
- There is now a form for requesting cheques from and submitting cheques to the Treasurer. Please contact him/her for a copy of the form via [treasurer@exmouthu3a.org.uk](mailto:treasurer@exmouthu3a.org.uk) or by phone.

**Support:**

You are not alone!

If you have any problems at the early stages of setting-up the group or at any time afterwards, please contact the Groups Coordinator.

He/She can provide support and assistance, backed by Committee Members. If we cannot answer your query immediately, we will look elsewhere for the answer. The U3A local, regional and national network has a great deal of experience and knowledge which can be accessed.

**Finally**, the most important thing is for you and your group to enjoy your sessions! It can be really stimulating and rewarding for you as Organiser.

Nigel Day, Exmouth and District U3A Groups' Coordinator

01395 264130 [groups@exmouthu3a.org.uk](mailto:groups@exmouthu3a.org.uk)

\*The Beacon administrative database is straightforward and simple to use. If you would like to know how to use it for your group, then please contact our Membership Secretary: Melanie Parker: [maparker@btinternet.com](mailto:maparker@btinternet.com) or Jan Harper Shea: [janharpershea@btinternet.com](mailto:janharpershea@btinternet.com)

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