



Harlow U3A Facilitator's Handbook

Guidelines, Advice and Information for Facilitators



u3a Harlow
Learn, Laugh, Live

<https://u3asites.org.uk/harlow/>

FEBRUARY 26, 2024

Harlow U3A Facilitator’s Handbook

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Document History

Note that the Facilitator's Handbook is a "Living Document" and is published only as a soft copy in .pdf format. Binders are available if you wish to keep a printed copy.

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If you have comments, suggestions or questions about anything in the Facilitators Handbook please send them by email to the Groups Coordinators:

HarlowU3A.GroupsCoord@gmail.com

The latest version of the handbook is available via the website (Groups Page):

<https://u3asites.org.uk/harlow/>

Latest Committee Approved Version – January 9th 2023

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INTRODUCTION

The U3A depends on its Groups and Facilitators to make the organization work. The Facilitator role is a great opportunity to extend and fulfill your ambitions, and to add something to our community as a volunteer. It should be rewarding, fun, not cause any anxiety or become burdensome in any way.

We live in a changing world that bears little resemblance to the one most of us grew up in, but we find we can learn, adapt and even enjoy the challenges that life brings in our Third Age. As the world changes so do the rules and we continue to adapt.

For our Facilitators that means adopting a few new ways of working to make sure we can all follow the necessary rules that are intended to reduce risks and keep us safe. None of our principles have changed, but the methods of managing our information are changing. The Committee asks for your support in making the changes as easy and quick as possible. In most cases there will be ultimately less time spent on the admin and more on the fun part of the job.

The April 2020 update to the Harlow U3A's Facilitator's Handbook was necessary to ensure that our U3A and groups are operated in ways that enable compliance with the laws and regulations we operate under and observe the current guidance of the Third Age Trust ("TAT"), the national organization that supports and guides the local, independent U3A's.

The General Data Protection Regulation (EU) 2016/679 (GDPR) was in effect at the time the Handbook was last revised and remains so in 2023. The 2018 Handbook was based on policies and procedures that were limited in scope and effectiveness to achieve compliance – but there were not many options, and none at reasonable cost. Importantly, it did not address methods the Committee needs to monitor, manage and control communications, operations and finances to assure **compliance as an organization**. The main weakness was in relying on members to use their own software and on-line user accounts to manage finances, membership and communications.

In 2019 the Committee decided to join the TAT Beacon Project, as the best available, reasonable cost and practical solution to managing our U3A to solve the data issues and achieving regulatory compliance. Beacon will also make our membership, finances and groups activities easier and more efficient to operate, as a single management tool for the whole organization.

In 2023 we have all the pieces in place to achieve the necessary compliance with data protection regulations, but depend on each Facilitator to make compliance effective, and on the practical side protect ourselves and Harlow U3A from loss and liabilities.

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Beacon is a web-based management system developed under TAT guidance for and by U3As. It includes functions for managing membership, finances, groups and communications, including email, in a secure environment using a single data set. The data and various functions are available to everyone who needs it, but data changes can only be performed by those authorized to do it, by role.

We started implementation of Beacon in January 2020 with the initial set-up, importation and validation of the membership data. Membership renewals were managed in parallel between Beacon and the existing spreadsheets from the January start of the renewal period. From April 1st 2020 all our financial transactions are also being recorded in Beacon and existing systems, with the goal of ending the current methods by the end of September 2020.

The changes in **procedures** between the last printed and latest on-line edition of the Handbook are substantial, as many will be performed in Beacon rather than using personal computers, email accounts and software, but will follow the **same principles**.

From April 1st 2022 **Harlow U3A** is a **Charitable Incorporated Organisation (CIO)** registered with the Charities Commission and, as such, has various legal and regulatory obligations. This means that Harlow U3A's Committee Members are its **Trustees** who have collective legal and fiduciary duties. The most important are to ensure that all activities are conducted within the bounds of the constitution adopted at the September 2021 Annual General Meeting and all money collected by the U3A, including monies collected by Facilitators, is accounted and used for intended, legitimate purposes. Beacon will help us ensure that these requirements are met.

On behalf of the Committee

Geoff Longster, Secretary

January 20th. 2023

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DATA PROTECTION

Current data protection regulations require us to store personal data securely to avoid unauthorized or illegal use and to restrict access to it to those who need it for the purpose for which it is collected and stored. For Harlow U3A we need to maintain membership and financial information and also contact or communicate with members for operational and safety reasons. The regulations cover all personal data whether stored in paper or electronic form, including images.

From April 1st 2020 our policy is to record and store all U3A information in Beacon, and use Beacon to support all communications, financial transactions, groups and membership records. As originally planned Beacon has been in full and complete operational use by all groups by September 30th 2020. Historical records have been kept in secure storage for the required retention periods, and Facilitators should no longer keep U3A contacts in their personal accounts or possession that are used for Harlow U3A business, including contacts for Group members. Further, Facilitators **MUST NOT** provide any U3A member's personal contact information to **anyone** without that member's permission.

To implement the processes and achieve the various goals the following principles are established:

- Facilitators must make a clear distinction between *personal* and **U3A** contacts and communications.
 - Beacon information and communications must be used for **all** U3A groups' business and activities.
 - The **content** of U3A communications, including email, must be for U3A groups' business and activities.
- Facilitators have access to group members' information in Beacon, appropriate to the nature of the group's activities, for example where safety is an issue such as in a walking group and communication may be needed between group members "in the field" more information is available than for, example, the crochet group but only with individual member's consent.
 - A Facilitator may **not** pass member contact details to any other person or organization without the prior approval of the member concerned. A record of this consent must be retained that indicates if the consent is for one or multiple events and any restrictions.
 - **Never** include a U3A group member in an email from a personal account to multiple addresses for U3A purposes.

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- A Facilitator **may not hold** contact details of the members of the group in personal contact lists unless used only for personal, non-U3A related purposes. You should delete/destroy any contact information you have for U3A members whom you only contact for U3A reasons as soon as possible.
- Facilitators contact details will not be published in the Newsletter, Website or otherwise be made available to members or publicly.
- The Website (Groups page) provides links to contact forms for members or the public to contact Facilitators by email without exposing personal information.

Note that Beacon stores member information, including email addresses, in a secure, access-controlled environment. When emails are sent to group members using the Beacon email function each recipient receives an individual, customized message that avoids any possibility of accidentally sharing email addresses. (More on how to send emails in the “Using Beacon” section below.)

Harlow U3A LOGO



The current (February 2022) U3A logo (above) is a registered trademark of TAT and may only be used by U3As affiliated to the Third Age Trust in the UK. No authorised user of the trademark may give permission for its use by a third party. Any such use must be agreed in advance by the Third Age Trust which has a policy on its use in, for example, articles or advertising.

If you wish to use the logo, perhaps for a one-off event and you are unsure whether it will infringe the rules do not hesitate to contact the National Office.

Direct telephone: 0208 466 6139.

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OBJECTS AND PRINCIPLES OF THE U3A

All U3A members are informed of the objects and principles of the organization on joining and agree to follow them. Part of the Facilitator's job is to ensure these principles are followed, mainly by acting in accordance with them.

The U3A is a non-religious and non-political organization that operates under three main principles:

The Third Age Principle

- Membership is open to all in their third age, i.e. when full time employment and family responsibilities have diminished or ceased.
- It is a life-long learning organisation and promotes the positive attributes of the U3A.
- We are encouraged to ensure that anyone who wishes to join the U3A can do so.

The Self-help Learning Principle

- Members form interest groups covering a wide range of topics and activities for its members
- Qualifications are not required to join the U3A and none are given. Learning is for its own sake, with enjoyment being the prime motive.
- There is no distinction between the learners and those who teach. All are U3A members.

The Mutual Aid Principle

- The U3A is a mutual aid organisation, operationally independent BUT a member of the Third Age Trust, which requires adherence to the guiding principles of the U3A movement.
- **NO** payments are made to members for services given to the U3A. We are entirely a voluntary organization.
- Each U3A affiliate is self-funded with membership subscriptions for general costs, which are kept as low as possible. Harlow U3A requires groups to self-fund their specific activities.
- Outside financial assistance should not be sought.

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INTEREST GROUPS

Introduction.

Leading a group can be a little time consuming at first, but it can, and should be, very rewarding. If you have any concerns whatsoever contact the Groups Coordinator assigned to your group, who will be able to help directly or know where to find what you need. (See the Newsletter or Website – Groups Page for current details of Groups Coordinators.) Running a group should be a joy, not a problem, there is plenty of help and the Facilitator role can, and should be, shared.

New members are sent an information sheet by the Membership Secretary upon joining Harlow U3A that includes how to access information to the Groups.

Group Minor Expenses

In principle all monies collected from U3A members are **charitable donations** and the property of the U3A. Funds held must be accounted for and only distributed for purposes that support the “Object” of Harlow U3A, as defined in the Constitution.

The issue of members **sharing small expenses** is recognized as an exception to the principle and may be done without records.

Collection and expenditure of **group funds** for goods and services, such as equipment, commercial transport, event fees and venue rentals **must always be accounted for.**

The following is offered to assist in ensuring that Facilitators (and all members) are never out of pocket by covering minor expenses which should always be shared, even though a host/hostess does not like to ask – **just drop the coins on the table:**

The Committee advises that:

- 50p is reasonable for individual group members to pay for tea/coffee/biscuits when provided in a member's home.
- Minor expenses within your group, e.g. photocopying on a home copier (cost advised at 10p per A4 copy) should be shared equally amongst the members.

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- If you, or a group member, offers another member a lift to any U3A activity (a group meeting place or the general meeting, for example) the passenger should contribute towards vehicle operating costs – ***without being asked***. The Committee suggest a rate of £0.50 per mile split equally between the number of passengers, including the driver. Note that sharing expenses in this way should not invalidate car insurance as expense sharing is not considered as “Carriage for Hire” or commercial activity.

Group Membership

- **Group members must be recorded in Beacon.** To do this initially follow the instructions in the “Using Beacon” section below. Before a new group member can be added to the list, they must have completed the joining procedure, had their personal information recorded by the Membership Secretary in Beacon, assigned a membership number and paid the dues. At this point you can add the new member to your group's list. If the prospective new member's name is not available to add to your group list contact the Membership Secretary. (u3aharlowmemsec@gmail.com)
- You can look at the list of group members in Beacon at any time. Members who are not current, i.e. dues remain unpaid 8 weeks after the due date of April 1st each year, will have their names highlighted in red. Remind these members that they must be current to attend group meetings and are considered “**Lapsed**”.
- Non-Members (**Visitors**) are permitted to attend your group, if you have a vacancy, **only once**, to find out if this group/activity is one they wish to pursue and the U3A is for them. Thereafter they must join the U3A or the terms of our insurance are violated and personal liability may exist.

FINANCIAL POLICIES AND PROCEDURES

Not all groups have expenses (beyond the minor expenses covered on page [6]) or collect money from their members. This section applies to those that do so, or might do so in the future, and outlines the required financial procedures for groups.

Harlow U3A policy requires that each group must finance its operations and activities fully by money collected from its members, though occasionally items of equipment may be purchased with general Harlow U3A funds at the discretion of the Committee.

There are specific requirements for Visits and Outings, which are considered to be Groups, although of a temporary nature.

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All money collected by groups becomes the property of Harlow U3A and must be handled and accounted for appropriately. The Committee Members (the U3A's Trustees) are responsible for the results of any financial mismanagement and therefore have total responsibility for ensuring safe custody and proper use of U3A money and assets. This includes publishing and enforcing effective financial management policies and procedures, and accounting for all money received and spent.

Facilitators (or in some cases, group treasurers) will usually wish to keep their own records so as to keep a check on which members have paid subscriptions or contributed to specific events and the expenses that have been paid. The references to records below are to the central records which we are required to keep to ensure that our accounts are complete and accurate.

COLLECTIONS AND EXPENSES

Collections

Money collected from members to pay for groups' activities is held (except for petty cash – see below) in the Harlow U3A Groups bank account. This account is separate from the Harlow U3A general account and is managed by the Groups Treasurer, whose contact details are supplied to new Facilitators. Money collected by groups must be passed to the Groups Treasurer as soon as practically possible.

Although the money belongs to Harlow U3A and is contained in a single bank account, the accounting records have a sub-account for each group that pays money into the bank account. While the group remains active it can use the funds it has paid into its sub-account to pay the legitimate costs of providing activities for its members. In the event that the group closes, any remaining funds will be transferred to Harlow U3A Groups account reserve and used for general expenses and to help start-up groups.

In no circumstances may a group open a bank account for group funds, and group funds may not be **held** in a personal bank account. It is however **permissible, and desirable**, for cash collected to be paid into a personal bank account and **immediately transferred** to the Groups bank account.

Money can be paid into the Groups bank account in the following ways:

- A BACS transfer may be made from the Facilitator's own bank account to the Groups account. Please **DO NOT** pay group funds into the **main account** used for membership fees
 - Account Name: Harlow U3A
 - Account Type: Business

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- Sort Code: 60-10-05
- Account Number: 84638826
- Reference: Group Name and Surname (Abbreviate as necessary)
- Cheques may be posted to the Groups Treasurer, whose address is provided as required;
- Cash or cheques may be passed to the Groups Treasurer at the monthly meeting, or at other times by arrangement;
- When a group needs to make frequent cash or cheque deposits, usually at least weekly, it may sometimes be possible to offer the Facilitator a paying in book to make deposits at a bank or Post Office.
- For all deposits the Groups Treasurer must be informed by e-mail about the deposit, with any relevant details. harlowu3a.groupstreas@gmail.com

On receipt of a payment, the Groups Treasurer will

- send an e-mail acknowledgement to the originator and to the Facilitator, if different;
- enter the transaction into Beacon.
- confirm to the Facilitator the new balance in the group's sub-account; and
- The Facilitator may ask the Groups Treasurer at any time for a full statement of the group's sub-account.

Expenses

Most expenses – for example, venue hire and transport costs – should be paid from the Groups bank account and this can be done direct by BACS transfer by the Groups Treasurer. Our procedures require that BACS transfers must be authorised by two bank signatories and the Groups Treasurer will obtain a second authorisation before making any payment.

The procedure for making payments to suppliers is -

- The Facilitator should ask the supplier to provide by e-mail an itemised invoice which includes their bank and contact details.
- The group Facilitator should check that the invoice is correct in respect of services provided and rates agreed, and that there are sufficient funds in the sub-account. If it is correct, the Facilitator should forward it to the Groups Treasurer for payment.

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- Provided that the group has sufficient funds in its sub-account, the Groups Treasurer will
 - pay the invoice by BACS transfer (or issue a cheque if for some reason a BACS transfer is not possible);
 - inform the payee that the money has been sent,
 - record the expenditure in Beacon.
 - confirm to the Facilitator that payment has been made, giving the new balance in the group's sub-account – as above, a full statement can be provided when required, and

When a Facilitator needs to pay for an item or service in cash and wishes to have the expenditure reimbursed from the Groups bank account, the Facilitator should obtain a receipt and forward it to the Groups Treasurer with an expenses claim.

Start-up Loans

As outlined above, the Groups Treasurer can normally make payment only when a group has sufficient funds in its sub-account to cover the payment. An exception is that a start-up group may be given a loan of up to £30 to help with initial expenses - for example, to hire a meeting room before it has a chance to collect contributions from members. Such loans will need to be repaid when the group is established and normally within six months.

Petty Cash

Facilitators may hold petty cash up to a **maximum of £60** and use it for legitimate group expenses. Any amount collected over the £60 limit must be deposited immediately with the Groups Treasurer.

The following rules apply to petty cash:

- Where possible, a receipt must be obtained for every purchase and retained until submitted to the Groups Treasurer.
- Petty cash may not be used for reimbursable expenses or payment of invoiced purchases. For example, if you buy something for your group on a credit/debit card you must first ensure that adequate funds are in the group's sub-account and then claim the expense reimbursement from the Groups Treasurer. You may not reimburse yourself from group petty cash.
- Petty cash transactions, including transfers to the Groups bank account, must be recorded in the Beacon Group Ledger (See "Using Beacon" below).

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- It is not permitted for a Facilitator to hold funds collected for trips or excursions. This could incur unnecessary liabilities.
- Where a group employs a professional instructor or consultant (which requires the approval of a contract for services by the Harlow U3A Committee), the costs of doing so may not be paid out of petty cash – they must be invoiced and paid by the Groups Treasurer.

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Required Financial Reporting

Petty Cash

At the end of each quarter, the Groups Treasurer will ask you to confirm the cash transactions made by your group and the ending balance, and will check your figures against the Beacon record to ensure that the latter is up to date. You will also be asked at these times to submit your receipts, preferably in scanned format by e-mail.

Bank Transactions

Shortly after the end (31 March) of each financial year, the Groups Treasurer will send you a statement of bank transactions for your group during the year and the ending balance in the sub-account. You will be asked to confirm that this statement is correct or to resolve any differences in discussion with the Groups Treasurer.

Equipment and Assets Inventory

- Equipment and non-consumables paid for by the group or general funds belong to Harlow U3A.
 - o All items must be labeled to show they belong to Harlow U3A.
 - o The Facilitator must keep an Equipment/Asset Inventory on the form – available from the website. Follow the instructions on the form
- If the group ceases operations, any equipment/materials must be returned to the Groups Coordinator. Do not pass items directly over to another group.

General Operations

Groups are recognized as the “Heart of the U3A” and their sustained existence and success depends on all the group members. The group is where the principles of the U3A come to life and where the importance of the Facilitator's role becomes evident, especially the volunteering aspect. The Facilitator's job should not be onerous or solitary – the idea of regularly soliciting additional help from other group members works well. Apart from sharing the load, it adds to the members' knowledge, provides a fulfilling volunteer experience and prepares newer members to take over Facilitator or committee roles in the future.

- The Groups Coordinators maintain a list of meeting venues in Beacon should you need to find a space to accommodate your group or you are a new group needing a venue if your, or a group member's, home is not suitable.

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- If appropriate, encourage your members to lead one of your monthly activities. The U3A is about sharing skills and interests.
- A waiting list should be discouraged. Try to persuade one or two members to start a new group together. The existing Facilitator or the Groups Coordinators can help and guide you if you are unsure how to start. A non-member cannot be placed on a waiting list.
- If you are unable to take your monthly activity, ask someone in your group to take it instead.
- If your group is likely to fold, get together with others in the group to share the running of the activity. You will probably need members for: Newsletter contact, membership, refreshments, booking the venue, recording the programme, tracking finances and informing all your members of your forthcoming events via Beacon, including the calendar.
- If your group changes meeting date, time or other items, please make the changes in Beacon and advise your Groups Coordinator.
- If a meeting is cancelled, make the change in the Beacon schedule, email members via Beacon and advise the Website Coordinator to post the notice on the Welcome page.
- Should an accident to an individual or damage to property occur on a trip organised by the group an Incident Report Form must be completed and sent to the Committee Secretary for filing. Keep a copy for your own records. The form must be kept for a minimum of 3 years in the event of a follow up or potential claim.
- Check with the Visits/Outings Coordinator before you **plan/book a coach for a trip**, in case two similar trips are arranged at the same time. We need to give members the opportunity for choice. (Contact the "Visits" Facilitator via the link on the website, Groups page.)
- A **record of attendees** at in-person group meetings **must** be made and kept for a minimum of 4 weeks after the meeting.
- In-person meetings must be **risk assessed**. This requirement will survive the Covid-19 pandemic, though may change in form; all risks are to be considered. Use the standard template provided by TAT (Form in Appendices section below). Your Groups Coordinators are able to provide specific and current guidance as conditions change. The risk assessment must be sent to each group member before the meeting. Note that the form includes a section on a **Personal Risk Assessment**. It is important that group members perform this part of the process, but no-one is required to provide evidence or any type of personal information.

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- o If your meetings are all at one venue, are essentially sedentary and government rules and restrictions have not changed, you can use the same risk assessment repeatedly.
 - **A few simple words in a meeting reminder email or your attendance record will do the job.**
- o If you use a public/commercial venue, you must consult and agree with the venue management on relative responsibilities.
- o If you use different venues or destinations, the meeting is an “outing” or the members participate in physical activity an appropriately updated risk assessment, covering all risks including location, weather and individual abilities, must be performed and documented.
- When a U3A member dies the situation needs to be handled sensitively so as not to cause unnecessary anguish to the family. Should you hear of a member's death (whether a member of your group or not) please let the Membership Secretary know, via email, including details of where the information came from. She will update the records and liaise with other groups as necessary. u3aharlowmemsec@gmail.com
- Our standard practice is not to publish obituaries or death notices of members in the Newsletter or elsewhere.

Visits and Outings

The travel industry in the UK is regulated by statute under the scope of The Package Travel and Linked Travel Arrangements Regulations 2018 (“PTR”). The main purpose of the rules is to provide specific protection to travelers, because of the nature of the travel industry and the changing market in package holidays.

Fortunately, charities and not-for-profits like our U3A are exempt from most of the regulations, but we must observe and maintain the conditions of the exemptions to operate our Visits and Outings (“V&O”). To ensure this is done the Trustees have put into place a set of policies and procedures to operate our V&O, intended to limit our liability and ensure our record keeping is adequate to fulfill our financial responsibilities and comply with the exemption requirements in PTR.

PTR limits us to running trips of less than 24 hours with no overnight stay. There is an option to organize a “few” trips with overnight stays each year. Any trips involving overnight stays will be organized through a travel agent who members will pay directly.

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V&O generates significant turnover for our U3A, more than any other group. As we must keep our annual turnover below £100,000 to retain our status as a charity eligible for free banking services, it is important that the financial aspects of trips are closely monitored by the Groups Treasurer, who will coordinate with the Treasurer to ensure the turnover limit is not exceeded.

- 1 V&O is managed by a sub-committee, chaired by our Vice-chair, a Trustee, (our constitution requires a Trustee to be a member of any sub-committee) and includes the V&O Coordinator and other non-Trustee volunteers.
- 2 We have decided to manage V&O in the same way as other groups, subject to the same general organization and rules, with some additional procedures to manage V&O that accommodate the temporary nature of V&O groups and ensures the financial and regulatory requirements are met.
- 3 When the V&O sub-committee decides on the details of a planned trip the Web-Coordinator will be notified and will set up the outing as a new group in Beacon, with a serial number, name based on destination, date, times, and general description that will appear on the website Groups list and Calendar.
- 4 The V&O coordinator will add members to the group as their bookings are confirmed and payment/deposit made.
- 5 The V&O coordinator will record payments by member name and number and coordinate deposits with the Groups Treasurer who will maintain the account for the trip.
- 6 The Beacon V&O record must be kept active for a minimum of 28 days after the trip, allowing for any adjustments or incident reports before closing the finances and transferring any surplus or loss to the Admin. V&O Beacon group.
- 7 The Groups Treasurer will notify the Web-Coordinator when all transfers are complete, and the Visit Group will be made inactive. (i.e. the Group data and linked financial data will be permanently retained but not visible to non-admin Beacon users)
- 8 The general rules and conditions for members joining a trip are:
 - a. Anyone joining a trip must be a current, paid-up member of Harlow U3A at the time of booking and the trip.
 - b. The visitor exception for non-members attending U3A events does not apply to V&O.
 - c. Payments must be made in full before the date specified for each trip and are non-refundable, except in the case where the trip is cancelled or the place on the trip is re-sold. The V&O sub-committee will maintain a waiting list for fully booked trips to aid re-sale.
 - d. Harlow U3A is run by volunteers. Every member joining a trip must pay the same set price.

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- i. Any incentive offered to trip organisers must be used to reduce the price for all members.
- ii. When visiting a location where some members may have free or discounted entry the benefit is shared by all, primarily to avoid additional record keeping and delays entering the venue.

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USING BEACON

It's easy! Really!.....



There's some initial set up to do at the start, but once that's done and you have learned enough to get along, the regular use is very straight forward, minimal and eliminates a number of chores that Facilitators currently do. It also makes the Treasurer and Groups Treasurer's jobs easier and provides a source of information to help the Groups Coordinators do their jobs.

In the following detailed guide you will see "[Navigation Tips](#)" that explain how screen items that allow you to perform various actions work. The same item or kind of item will work the same way on other pages, so the "Tips" are not repeated. The screen items are generally intuitive, found in many different applications and you will become familiar with them quickly.

If you run into problems, have questions or comments about using Beacon please contact the Beacon Administrator by email at: HarlowU3A@outlook.com

Log-in

Before you start you will be contacted by the Harlow U3A Beacon Administrator and sent your **user name and initial password by email**. Have this to hand, along with your current list of group members and the information that confirmed your group's account and petty cash details at last March 31st with the Groups Treasurer. (Later on you will need details of any cash or bank transactions made by the group from last April 1st onwards)

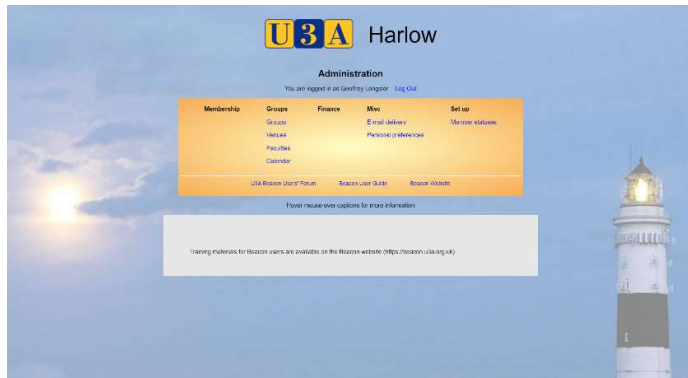
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- Open your computer's web browser and enter the URL for the Beacon site
<https://u3abeacon.org.uk/>

Beacon will open at the Login Screen – it looks like this.

- In the white box labelled “U3A” you will see a “Down Arrow” symbol – click it.
- You will see a list of all the U3As subscribing to Beacon.
- Press the “H” character on your keyboard a few times until you see “Harlow” highlighted, then press “Enter”
 - (Depending on your computer's settings, but most likely, the next time you log in the U3A box will already have “Harlow” entered.)
- Enter your Username from the keyboard
- Enter the password you were sent.
- If you are on your private computer leave the tick in the box – you should not have to do anything.
 - However, **do not** access Beacon from a public or shared computer.
- Press Enter
- On your first login **only** you will be asked to enter a password.
 - There are password rules – put in upper & lower case letters, number(s) and special characters (with some exceptions – you will know if you have used one)
 - Make sure it is not the same as a password you use elsewhere.
 - Next time you log in, depending on your computer settings, your username and password may well be pre-entered. This is OK if you do not share your computer **and** you use a password at startup.
 - Do not share your username and password with anyone.
 - If you forget your password the Beacon Admin. can re-set it.

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When you log on after the first time Beacon will open at the Home/Administration Screen. that will look **something** like this. (Exactly what you see will depend on the security roles assigned to you)

Navigation Tips

- When you see a screen item which is **light blue text** it is a clickable link to another screen.
- The Home/Administration screen is the only screen with the **Log Out** function
 - Many other screens have a **Home** button that will return you to this screen.
- The Admin screen has links to the Beacon User Guide – if you are interested to finding out more about the broader functions.
- Beacon has an automatic time-out function – access it via the Personal Preferences link. You can set the timeout up to a maximum of 20 minutes.
 - The time is calculated from the last time you changed anything.


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Groups Procedures and Information

- On the Home/Admin screen, click on the blue “Groups” link under the black “Groups” column heading
- It will take you to the [Groups List](#), which looks like this:

Select	Group	Active	When	Where	Facilitators	Members	Max	Waiting
▲ ▼	A							
<input type="checkbox"/>	Art & Design	Y	First Tuesday Monthly	St. Johns Arts and Recreation Centre	Lorraine Foy	2		
<input type="checkbox"/>	Arts In and Around Harlow	Y	Irregular all year round	Varies - Members notified	Ann Flint	1	999	
▲ ▼	B							
<input type="checkbox"/>	Badminton	Y	Weekly Tuesday PM all year round	Norman Booth Centre	Ian Mortimer	1		
<input type="checkbox"/>	Bird Watching 1	Y	Third Friday AM all year round	Varies - Members notified	Ed Hughes	1		
<input type="checkbox"/>	Bird Watching 2	Y	Second Wednesday AM all year round	Varies - Members notified	Ed Hughes	1		
<input type="checkbox"/>	Book Group 1	Y	Third Tuesday PM all year round	Facilitator's Home	Carol Tautz	1		
<input type="checkbox"/>	Book Group 2	Y	Second Wednesday AM all year round	Shiptons, Gilton	Mary Jackson	1	10	
<input type="checkbox"/>	Bridge	Y	Weekly Wednesday PM all year round	Harlow Rugby Club	Janice Jones	1		
<input type="checkbox"/>	British Sign Language A	Y	Weekly Tuesday PM term time only	Gateway Centre	Carol Lynch	1	10	
<input type="checkbox"/>	British Sign Language B	Y	Weekly Tuesday PM term time only	Gateway Centre	Carol Lynch	1	10	
<input type="checkbox"/>	British Sign Language C	Y	Weekly Thursday PM term time only	Gateway Centre	Carol Lynch	1	10	
<input type="checkbox"/>	BSL Improvers	Y	Weekly Tuesday AMPM term time only	Gateway Centre	Carol Lynch	1	10	
<input type="checkbox"/>	Bus Pass	Y	Irregular all year round	Varies - Members notified	Linda Gold	1		
▲ ▼	C							
<input type="checkbox"/>	Card Making 1	Y	Second Monday AMPM seasonal	St Clare Hospice	Joan Jones	1	16	
<input type="checkbox"/>	Card Making 2	Y	Fourth Wednesday PM all year	Great Parndon Library	Barbara Abbott	1		

Navigation Tips

- Many “List” screens have additional boxes like the “Faculty” box on this picture, where the list can be filtered to display a sub-set of the whole list.
 - (The only “Faculty” we use on the Groups list is to enable the split of the groups between the two Groups Coordinators – Facilitators won’t need to use it)
- List screens also have the **dark blue alphabet** just above the screen – when you click on a letter the screen will put the part of the list that matches the letter clicked with the first Group name initial letter at the top of the list
- You may see an up or down  arrow at the right top or bottom of the screen – clicking it will take you to the top or bottom of the list

Use the “Tips” above to navigate to your [Group](#) on the list

- In most cases your [group name](#) will be in light blue and others will be black text.
 - The blue generally indicates an available link. The links (and menu items) available to each user depend on assigned roles that are designed to allow control and security of personal and financial information. This means you can only **change** data that you are responsible for, but no-one else can, but you can see just about everything that is not sensitive.
- Click on your [Group](#) name – this will take you to the [Group Detail](#) screen

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U3A Harlow

Home - Groups List - Faculties - Venues - Add New Group

Group Record for Grow 2 Eat

Details Schedule Members Ledger

Group Details

Group: Grow 2 Eat

Faculty: A - K Status: Active Max members: 15

Allow members to join on-line Enable waiting list Notify facilitator of changes

When: Second Tuesday AM March - September

Normal start time: 10:00 End time: 12:00 Contact: glongster@hotmail.com

Venue: Harlow Museum

Information:

Notes:

Information given here will be used for publicity

Save Record Delete

- If any of your group's information changes, you can alter it here.
- Click on the [Schedule](#) link

U3A Harlow

Home - Groups List - Calendar

Group Record for Grow 2 Eat

Details Schedule Members Ledger

Group Schedule

Show Detail

Date & Time	Until	Venue	Topic	Enquiries	
Tue 12 May 2020 10:00	12:00	On-line	What's Sprouting in Spring?	glongster@hotmail.com	edit delete
Tue 9 Jun 2020 10:00	12:00	Harlow Museum - map		glongster@hotmail.com	edit delete
Tue 14 Jul 2020 10:00	12:00	Harlow Museum - map		glongster@hotmail.com	edit delete
Tue 11 Aug 2020 10:00	12:00	Harlow Museum - map		glongster@hotmail.com	edit delete
Tue 8 Sep 2020 10:00	12:00	Harlow Museum - map		glongster@hotmail.com	edit delete

Add Events

First date and time: 10/05/2020 10:00 then every 2 Weeks

Until: Number of events (1) Not beyond 31/3/2021

End time: 12:00 Exclude from public calendar

Venue: Harlow Museum Enquiries: glongster@hotmail.com

Topic:

Details:

To add a single event, set Number of Events to 1

Add Events

Home - Groups List - Calendar

- This screen allows the user to create a schedule for the Group's meetings. The information is used in the Public Calendar of meetings and is available to all Harlow U3A members and in a limited form to the general public via the website.
 - The schedule set up procedure is quite detailed, and is well covered in the User Guide available via the Beacon website. Contact the Beacon Administrator if you need help.
 - It is worthwhile entering your group meeting schedule, particularly if you want new members for your group. It is also useful for other groups to know when you meet to avoid conflicts when setting up events.

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- Click on the [Members](#) link



Note: Personal information (Phone numbers) has been hidden in the image above. You will see this for members of your group.

The Members screen is where most of the Facilitator's jobs are done, including the first things you need to do when using Beacon.

The first job is to create the list of group members. You will need your existing list of members to hand to create the list in Beacon.

- When you start the only name(s) on the list will be the Facilitator(s)
- Look for the "Add member by name" box and click the Down Arrow next to the "select member" text.
 - The list of all members will be displayed, in **Last Name Order**
 - Navigate to the member's name you want to add to the list – multiple keying of the last name initial or scrolling will get you there
 - When the name is highlighted, press "Enter".
 - You will see the member's details added to the list – in last name order.
- Continue the same process until all the group members are included in the list.
 - A caution: We have a few members who have the same or similar names. Be sure you check if that seems likely by looking at the member number on your current list, and then using the "Enter by Member Number" method of entry.
 - ...or, if you have made the entry and the phone numbers do not match, delete and try again.
- If you have a group member on **your** list who does not appear on the Beacon list of all members please contact the Membership Secretary (u3aharlowmemsec@gmail.com) and she will advise what to do.
- When a new member joins your group, add them to the list in the same way as above.
- Any time a member leaves the group, delete the retiring member using the [Remove](#) button next to their name.

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Using the Group Members List

There are a number of useful functions available from the Group Members screen that will help you to manage communication and administration:

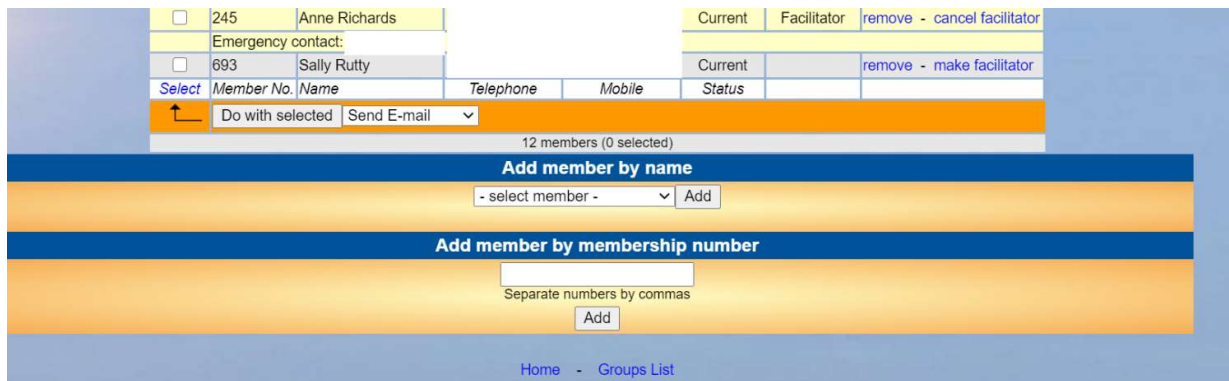
Member Status Checking


- If a member's name is highlighted in **red** on your members list it means their membership is **not current**.
 - Check the list regularly and give a **gentle** reminder to members who are not current.
 - Status changes usually occur on April 1st of each year, the due date for membership renewals. The status check should be done before your first April meeting each year. This replaces the Membership Card check we have done until April 2020.
 - Members who are not current by June 1st each year are considered lapsed and should not attend groups. It is a condition of our **insurance coverage** through TAT that all attendees at U3A events and meetings are current members.
- You also have access to refer to your group members' phone numbers.
- If your group's activities require contacts between members for safety reasons, such as walking or cycling, you can download and distribute your members list, including phone numbers. (See Group Communications, below)
 - If it is prudent, due to the group's type of activity, for members to provide **emergency contact information** collect this and forward to the Beacon Administrator (HarlowU3A@outlook.com), preferably as an Excel or Word document, who will enter it for you.
- Access to any member's information by Facilitators is limited to what is essential for the group's safe operation. This does not include home addresses.
 - If you need a home address contact the Membership Secretary, who will require a reason and may impose conditions.
- Refer to the **Data Protection** section, above, for guidance on what you may and **may not do** with the member information you have access to.

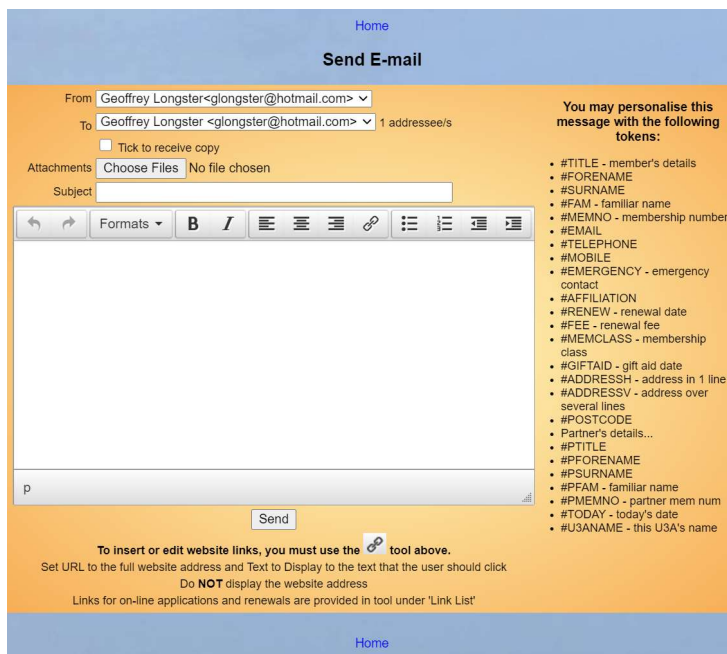
Sending Email

- Beacon provides an easy and secure method of contacting members by email and keeps personal information secure.
- Be familiar with the guidance provided in the **Data Protection** section, above, and follow the rules to avoid any possibility of exposing members to risk and our U3A to legal liabilities.
- The email function is accessed from the Group Members screen – at the bottom of the list.

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- Select the members you want to send your message to.
 - If to just one or a few members, click the white box in the left column, next to the member number
 - If to all the members click on the blue *Select* label at the bottom of the left column. Then click on the “Email Only” item on the list.
- Members with this  symbol next to their name do not have email.
 - If possible check with the member and ask if they do in fact have access to email and get the address from them, so that as much communication as possible is by email. Send the email address to the Membership Secretary to be added to the member’s record.
- At the left of the bright orange band at the bottom of name list, look at the boxes labelled “Do with Selected” and “Send Email” – this is the default value.
 - Click on the “Do with Selected” button: The Email screen will open.



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- This should look somewhat familiar to anyone who has used email.
 - Your addressees are already populated.
 - If you are on the members list, no need to “tick to receive copy”
 - You can use the “Attachments” – when you click on the “Choose Attachments” box it will open a familiar-looking search function.
 - Enter your Subject Line text.
 - Enter your message – type it right in the screen or copy and paste from somewhere else.
 - As each message is individually created and dispatched, avoiding any possibility of accidentally sharing the distribution list and individual's personal information, you can personalize each message using the “Substitution Tags” available. They are listed at the right side of the screen – each tag or “Token” starts with the # character and the alpha characters must be UPPER CASE.
 - For example, placing “#FAM” in the greeting in your message will arrive in the recipients inbox as “Geoff” – the “Familiar” name. There are plenty of options to chose from, covering many eventualities. Just type them where you want the personalized information to appear in the text.
 - Note that, *in the interests of security*, there is **NO**:
 - Mail forwarding
 - Graphics inclusion
 - It is advised to use the “Links” (chain icon) to insert links to websites in your emails. Make sure you have validated these links as known and safe before sending.
 - Check your message and “Send”.

Navigation Tips

- Try sending a few emails to yourself to get the hang of it before releasing your first message to a larger list.
- Click on the box that defaults to “Send Email” – there are other things you can do including writing a letter, and even adding new members to the group.
- If you want to send the information in an email you receive to your group it is safe to print it as a .pdf then attach it to your Beacon email. There will be pictures, but no links or potentially dangerous embedded items.

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Group Petty Cash Ledger

The Group Ledger is used to keep track of the cash collected from members to cover the various expenses of operating the group. When the group's financial transaction records are kept in Beacon it makes the process of validating the group's finances very quick and easy for both the Facilitator and the Groups Treasurer. Maintaining the groups' cash records in Beacon also has the advantages of being secure and consistent between groups.

Only the Group Facilitator has access has access to the Group Ledger for their group. The Group Ledger is completely separated in the system from the main U3A accounts, and every other group's ledger. (The main accounts in Beacon are not visible to Facilitators). The Groups Treasurer has access to the Group Ledger for all groups.

Note that only members designated as Facilitators in Beacon can enter and change the group's records, including the details meetings and schedules. A group can have more than one "Facilitator" in Beacon. This section deals with how to account for the group's collection of money from members and expenditures.

For more information on overall procedures see the Financial Procedures in the Interest Groups section above.

If your group splits the facilitator duties and one person does the bookkeeping, please let the Beacon Administrator harlowu3a.webcoord@gmail.com know so that the person can be set up as a Beacon user – for example a Group Treasurer would be still listed as another Facilitator.

- Access the Group Petty Cash Ledger screen from any of the Groups screens – "Ledger" button.

Home - Groups List

Group Record for Grow 2 Eat

Details Schedule Members Ledger

Group Ledger

From 1/4/2020 to 31/3/2021

Date	Payee	Detail	In	Out	Balance
		Brought forward			£42.50
Date	Payee	Detail	In	Out	Balance

Download Excel

Add transaction

Date	Payee	Detail	In	Out
18/05/2020				

Save

Home - Groups List

You will see the "Balance Forward" amount for your group as of last April 1st, as you confirmed with the Groups Treasurer.

- The first job will be to update the ledger with any transactions you have recorded since last April 1st – you will need your records to hand.
- Click on the Date box – you will see a calendar "widget"

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The screenshot shows the 'Add transaction' form. At the top, there is a 'Download Excel' button. Below it is a table with columns: Date, Payee, Detail, In, and Out. A date picker is open, showing May 2020. Below the date picker is a calendar grid. The table below the calendar has the following data:

Date	Payee	Detail	In	Out
22/05/2020	Harlow Museum	Room Rental		20.00

At the bottom of the form, there is a 'Save' button and a note: 'To add a new transaction, complete the fields required and press Save'. There is also a 'Groups List' link.

- Use the arrow in the month and year boxes to navigate to the period of the actual **transaction** and click on the day. The transaction date will be entered.

- Enter the Payee, Detail and amount in the fields of the “Add Transactions” section of the screen. Check and then press “Save”

- “In” is a collection of money – include the member’s name in the detail
- “Out” is an expenditure. Make sure you keep receipts safely until the year end when they will be turned over to the Groups Treasurer.
- Record an “Out” transaction when you transfer money to the bank account

The screenshot shows the 'Group Ledger' table. It has columns: Date, Payee, Detail, In, Out, and Balance. The data is as follows:

Date	Payee	Detail	In	Out	Balance
		Brought forward			£42.50
22 May 2020	Harlow Museum	Room Rental	£20.00	£22.50	edit - delete

Below the table, there is a 'Download Excel' button and an 'Add transaction' form with fields for Date, Payee, Detail, In, and Out, and a 'Save' button.

- Your transaction will be recorded and balance updated.
- Check your recorded balance with actual cash held regularly.

- Remember that you should never hold more than £60.00 in cash.
- Transfer cash over this amount to the Groups Account, informing the Groups Treasurer of the transfer details by email.

Beacon injected some potential confusion in this process by using some non-standard financial terminology in the labels. The Beacon project is aware of this and something will be done to fix the issues when an upgrade takes place – not seen as critical items.

In the meantime, **only** in reference to the **Groups Screens**, be aware:

- “Payee” is misleading – this is the person, company or organization the transaction was performed with. They could be a Payee or Payor. Beacon is based on simplicity – this is perhaps over-simple to the point of being wrong. Just ignore.
- “In” – means cash received
- “Out” – means cash paid out.
 - Clear enough, but not standard financial terminology.

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Guidance for Managing VISITS AND OUTINGS

Visits and Outings (“V&O”) are managed in Beacon with the same features and functions as other groups, but using a “Group per Trip” approach. This means the groups set up for V&O are for “one-time use” and a few steps are needed to manage the process for each trip.

A new V&O “Group” is set up in Beacon by the Administrator when a trip has been decided on by the sub-committee. The Beacon group is used by the V&O Coordinator to keep a record of the U3A members going on each trip, aid communication with them and allow the Groups Treasurer to manage the financial aspects of the trip.

When the Beacon group is ready the V&O Coordinator will populate details of the trip, including the schedule and creating a single “Event” in Beacon. This will make the trip visible on the website, including an anonymous email form directed to the V&O Coordinator.

Navigate to the Groups screen in Beacon, select the V&O Group you want. The Group Detail screen will open by default:

The screenshot shows the 'Group Record for Visits&Outings 4 - PrettyWoman' form. The form is titled 'Group Details' and has tabs for 'Details', 'Schedule', 'Members', and 'Ledger'. The 'Details' tab is active. The form fields are as follows:

- Group: Visits&Outings 4 - PrettyWoman
- Faculty: L - Z
- Status: Active
- Max members: 40
- Allow members to join on-line:
- Enable waiting list:
- Notify facilitator of changes:
- When: Single Scheduled Trips
- Normal start time: 14:30
- End time: 22:30
- Contact: Via Website
- Venue: Coach Trip
- Information: Trip Sold Out - contact Barbara for waiting list info. For more information [Click here to email the Facilitator](https://u3asites.org.uk/harlow/ mailing/c:51886 style=) Barbara Abbott
- Notes: (empty)

Group record created 28 Apr 2022 20:31; last changed 28 Apr 2022 20:31

Buttons: Save Record, Delete

Enter the various details, in a similar way to the image above.

- The times are used in creating the calendar.
- “Max members” should be ticked – this works in coordination with the “Waiting List” – tick this box too.
- The text in the “Information” box appears on the website. The section that begins “For more information...” is a snippet of code that looks like the following when viewed on the website – please don’t change this!

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▸ Visits&Outings 3 - Southwold

▾ Visits&Outings 4 - PrettyWoman

We regret that this group is full:

Meets Single Scheduled Trips
Venue Coach Trip
Details Trip Sold Out - contact Barbara for waiting list info. For more information [Click here to email the Facilitator Barbara Abbott](#)

▸ Visits&Outings 5 -Leeds Castle

When you enter the schedule in this screen:

Group Record for Visits&Outings 4 - PrettyWoman

Details Schedule Members Ledger

Group Schedule

Show Detail [Click to access the ledger for this group](#)

Date & Time	Until	Venue	Topic	Enquiries
Wed 14 Sep 2022 14:30	22:30	Coach Trip	Savoy Theatre - Pretty Woman	barbabbott7@aol.com edit delete
Date & Time	Until	Venue	Topic	Enquiries

Add Events

First date and time: 09/06/2022 14:30 then every 2 Weeks

Until: Number of events 1 Not beyond 31/3/2023

End time: 22:30 Exclude from public calendar

Venue: Coach Trip Enquiries Via Website

Topic: [Text Box]

Details: [Text Box]

To add a single event, set Number of Events to 1

Add Events

Help Home - Groups List - Calendar

Make sure you set the number of events to "1" to show the single trip in the calendar.

Enter members who are joining the trip in the same way as for any other group, described above.

Use the email function on the "Members" screen to contact members as needed.

When the trip is complete go through the process of closing out the accounts with the Groups Treasurer and transferring any balance to the Visits Admin Group. Advise the Beacon Administrator by email when the trip is closed, when it will be made inactive a minimum of 28 days after the trip.

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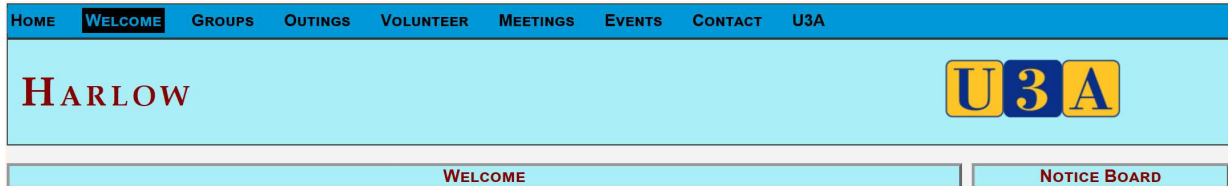
REFERENCE INFORMATION

All the forms referenced in this handbook, with the exception of items sent to Facilitators pre-filled, are available via the website, where the latest version will be available.

Website

Access our Harlow U3A website at: <https://u3asites.org.uk/harlow/welcome>

The site will open at the **Welcome** page.



The other pages are accessed from the “Tabs” at the top of the page (Black text in the dark blue band).

Every page has text on the left, clickable links to other items and pictures on the right. Some pages have links in line.

You can ask the website coordinator to add or change items – see the Contact Page for details.

Welcome:

This page is updated regularly and presents current information regarding

- Updates on meetings
- The Newsletter
- Membership applications
- A “Noticeboard” that is regularly updated

There is also general information about Harlow U3A and the town.

Groups

- The Groups page has regularly updated “News and Views”, notices and information about the Groups Coordinators. This is followed by a list of all the active groups with a link to a contact form to send an email to the Facilitator.
 - Please send items about your Group for inclusion on the website to the Web Coordinator: harlowu3a.webcoord@gmail.com

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- There are links to the Beacon Groups list and Calendar. It is important that Facilitators keep their information up to date in Beacon so that the information available to members and the public on the website is always current.
- The right side of the Groups page has links to the current versions of forms the Facilitators may need:
 - Equipment Inventory
 - Expenses Claim

Outings

This page is updated the weekend before regularly monthly meetings with the latest information on Trips and Outings organized by the Trips and Outings Coordinator.

Volunteer

This page presents a list of local volunteering opportunities outside the U3A, with links to more information and contacts.

Meetings

This page contains information on our monthly general meetings, including information about the speaker or other events planned for future meetings – usually at least six months in advance.

There are links to draft minutes of the most recent AGM and Committee meeting, with attached financial reports.

Events

This page is linked with the “Arts in and Around Harlow” Group – which is not really a “Group”, but an email distribution list managed by the group’s facilitator – contact information via the Groups page to sign up to the list. The page provides links to venue information and some events in the forwarded emails that may be of interest to a broader group of members. Most of the venue links are to a website with current programmes and ticket information.

Contact

This page provides a way to contact committee members via secure email for members and the public.

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U3A

This page is a link to the National U3A organization website – there's plenty to explore and it is updated regularly. You can subscribe to email lists and the national newsletter via the website.

NEWSLETTER

The Newsletter is designed for U3A members. Contributions from Facilitators and Members alike should be U3A related. If there is available space in an issue, non-related U3A items will be considered, if they are deemed to be of particular interest to members.

Consider the following when thinking of contributing to the Newsletter:

1. Is your item related to U3A?
2. What do you want to achieve with your newsletter item, e.g. you might want more members in your group, provide a short reminder of when, where you meet etc.
3. Photo attachments enable your item to be more interesting to the reader.
4. It would help if when sending photos you detail who is in the photo and who took the photo. Please note that all photos are the copyright of the photographer and permission is needed from the photographer for its use.
5. Photos may need to be reduced by the Newsletter Editor to fit the space available.
6. If you wish to write more than a few lines, please try to keep your contributions to no more than half page (around 250 words). However, if a little longer these will be considered.
7. If you make any changes to your Interest Group information, please notify your assigned Groups Coordinator who will ensure the changes are made where needed, including the Newsletter and website.
8. Advertisements help with the cost of printing the document so please let the Newsletter Editor know of possible advertisers.
9. Members receive a 10% discount for their own advertisements.
10. Please send your contribution direct to the Newsletter Editor to the specially created email address: harlowu3anewsletter@gmail.com
11. Please entitle in the Subject box of your email 'NEWSLETTER' followed by the group or topic to which you are referring.

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General Meeting Notice / Information Board

At our monthly general meetings, an **Information Board** is available for items to be displayed and a small table placed alongside for leaflets/handouts.

We welcome posters/leaflets, including those from around the community, for consideration which might be of interest to our members.

Our information board is situated in the bar area at each General Meeting. Do take a look at this to avoid missing some interesting news items.

Please contact the **Meet and Greet Coordinator** if you wish to show an update of your group meeting or any other item of interest.

➤ Please do not place posters/leaflets on the board directly yourself.

Venues/Accommodation FAQs

Note that details of venues used by U3A groups in Harlow are maintained in Beacon and also available via the website.

The following FAQs produced by the Third Age Trust

- If a U3A uses a hall to hold an interest group or run an event, is it covered for Public Liability?
 - Yes, subject to the normal test of legal liability.
- If a U3A uses a member's home to hold an interest group or run a meeting, is it covered for Public Liability?
 - Yes, subject to the normal test of legal liability. Injury or damage due to a defect in the property would be the responsibility of the house owner/occupier, usually covered under householder insurance.
 - Personal equipment used in U3A meetings is NOT covered for loss or damage.
- What is the situation regarding the hire of a hall where the contract with the hall hirers appears to make the U3A responsible for all loss and damage?
 - This is not acceptable as any damage or injury proven to be caused by a defect in the property and/or the facilities is the responsibility in law of the building owner. You should bring this to the attention of the person handling the hire and ask that the clause be removed but if you fail to achieve that, our insurers have said that in the last resort, you can sign the contract because the clause is unenforceable.
- Is there any home contents insurance provided?
 - Each U3A has up to £25,000 cover per claim for damage to any home contents belonging to a U3A member hosting a group.

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Outings

Tips for Booking Coaches Suggested by our Events Coordinator

Note that there have been recent changes in law and TAT guidance in respect of trips organized by U3As because of the potential to incur legal liabilities. We must also keep our total annual turnover below £100,000 to qualify for the free banking services available to small charities. All trips, including those organized by groups, that involve any collection of money from members, must be coordinated through the **Groups Treasurer**. Simply, if we start to look too much like a travel agent, we fall under the industry regulations and could lose our free banking.

1. Decide if you have enough people to warrant paying for a coach.
2. If you have under 30 people you would find it cheaper to use the Community Transport. Ask the Community Transport Coordinator.
3. Coaches can be 35, 49 or 53 seats, the bigger the coach the less costly it will be per member.
4. Telephone coach companies for price quotes, you will need to tell them the pickup times, the pickup places, the destination and the time you wish to return. You will be given an order number for each quote. Ask the company for how long the quote is valid in busy times this could be as short as two weeks.
5. Don't forget to add the drivers tip to the quote price before working out the cost per person.
6. Take the money first before adding members to the passenger list and make sure they know it is on a non-returnable basis the coach company will have to be paid even if people drop out. Give a receipt with pickup times. (See Appendices for an example receipt).
 - a **All** monies collected must be delivered to the Groups Treasurer
7. When you have the money to pay for the coach, telephone the coach company quoting the original order number and make a firm booking. You will then receive an invoice. Check the details are as arranged.
8. Payment can be sent up to two weeks before the journey by using a U3A cheque obtained from the Groups Treasurer, who will need a copy of the invoice.
9. Sometimes a venue will offer a free place for the organiser. U3A guidance is that no one person should take this but share what would be the individual cost amongst the members going on the trip.

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10. Always ensure you have a copy of the **Incident Report Form** on your trip (Website download). This should be completed immediately should there be an accident involving an individual or damage to property. A copy of the completed form must be sent to the Committee Business Secretary, in case there is a follow up or a potential claim. The form to be kept on file for at least 3 years.

Tips on booking a Venue when organizing an outing

Check with venue for

- Costs (including concessions and group rates).
- Available dates
- Guided tours: group size tour times duration of tour
- Free flow: are there timed entry tickets?
- approximate time needed at venue
- Facilities restaurant/café
- Picnic area, shop, disabled access arrangements for hearing and visually disabled people

Transport

- Public transport — bus passes, rail cards
- Use own transport, share vehicles
- Meet at venue
- Travel by coach — see 'Tips for booking coaches'
- Harlow Community Transport — Enquiries must be made through the
 - Community Transport Coordinator (see Community Transport page)

The U3A insurance policy provides cover for the legal liability of the U3A and so any claim would have to prove negligence in some way against the U3A, for example, it would have to be shown that any accident to a parked car, whether in a recognised car park or not, has been occasioned wholly or in part by the negligence of the U3A. This would not normally arise just because the car owner had permission to use a recognised car park at, for example, a local school or village hall. For a claim to succeed against the U3A, the car owner would have to show that he had been led to expect that his property would be protected and would have to show that the U3A or its agents, had been negligent in failing to provide the proper level of protection.

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Community Transport

The Harlow Community Transport service no longer operates in a way that works for U3A group trips.

Commercial services (coach hire) or shared rides are the transport options for group trips

APPENDICES

Insurance and Licences

The Third Age Trust organises some Insurances and Licences through their nominated providers. Full details can be found on the National Office website <https://u3a.org.uk>

However, included are:

Public and Products Liability: Legal indemnity is provided for U3A members whether you meet at a rented venue or in a member's home.

Tour Operators' Liability: This cover is for a Facilitator who wants to arrange a short study trip for the group, involving an overnight stay. The Third Age Trust advises that if you wish to organise a U3A holiday this is done through a bonded travel agent/tour operator. All trips involving commercial transport and accommodation **must** be coordinated through the Trips and Outings Coordinator and funds collected and disbursed through the Groups Treasurer.

Licences:

UK copyright law is not simple, but if in doubt DO NOT COPY and distribute any published material – in any medium. Items copied for limited personal use are treated differently – and do not apply to U3A **groups**. Each copyright case is viewed on the basis of the perceived importance of the extract rather than the quantity and can be expensive to defend. However, Harlow U3A holds licences for:

Photocopying (CLA) and recorded music (PPL). These are renewed annually for a small subscription.

- Maps and newspaper licences can be purchased from the following:
Ordnance Survey — 03456 050505 or <https://ordnancesurvey.co.uk>
Newspaper Licensing Agency — 01892 525273, <https://nla.co.uk>
- Digital Images - you need to be careful here. Just because these are on the internet and thus in the public domain, they are not free to use unless copyright has expired or permission obtained.
- Sheet music — ***It is illegal to copy sheet music.*** Contact the Music Publisher's Association, <https://mpaonline.org.uk> for further details.
- DVDs & Videos — The Third Age Trust does not have a blanket licence arrangement with film copyright holders or organisations. However, Interest Groups are usually covered by an exemption in the Copyright Law which allows the use of videos or DVDs for educational purposes.

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If you are thinking of starting a film interest group please note that the above does not allow the viewing of films for entertainment. Find out more on film licences from <https://themplc.co.uk>, 01323 649647 or <https://filmbank.co.uk>, 0207 984957.

You can download a fact sheet from the <https://copyrightservice.co.uk> to learn more on Copyright Law.

Contacts and Resources

U3A National Office:

The Third Age Trust, 52 Lant Street, London SE1 IRB. Tel: 0208 466 6139.

Web: <https://u3a.org.uk>. Opening times 9.30am to 4.30pm.

The 'Members' Area' on the website provides access to the Resources Library, online courses, the online shop as well as access to a variety of information to keep you up to date. You need to register before you can obtain this information. It is a simple and quick process. You will be sent confirmation of your registration.

Resources Centre:

Opening times Tues to Thurs 9.30am to 3.45pm. Tel. 0208 466 6139.

A selection of DVDs and CDs are available for loan, free of charge, except for the return postage. You can borrow an item for 3 weeks and extend if another group hasn't booked the item. The library is not for personal use but for use at your group meetings.

After confirmation of your registration has been received from National Office you can then obtain a separate registration number from the Resources Centre to access the library. Go to the National Office website, pull down 'Resources' menu then click on 'Resources Centre'. There is a button on the top right hand corner where you can register as a new user. If you prefer you can contact the Centre by calling 0208 466 6139 to register. Once registered you can either order items online, by email, resource.centre@u3a.org.uk or post. You will need to quote your dedicated booking reference to use whenever you wish to borrow an item.

Publications:

There is currently one publication sent direct to a member's home address if they wish to receive them.

'Third Age Matters', sent out 5 times a year, This publication informs you of what is happening around the U3As and U3A in general.

Do let the Membership Secretary know if you do not wish to receive "TAM" as it is a direct cost to Harlow U3A.

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National Subject Advisors:

Subject Advisors can offer help with your group if you need it. This may be because you are a new group or you wish to obtain ideas on how to stimulate your existing group if you feel it is needed. A current list is provided in this handbook. To contact a particular subject advisor you need to go via the National Office website.

Some advisors have their own newsletters.

The National Office website can inform you if there are any new or changes to the list. A list is regularly detailed in the 'Third Age Matters' magazine.

Essex Association of U3As:

Web address - <https://u3asites.ora.uWessexassociationu3as>.

Here you can access websites of over 50 U3As in the Essex area. Why not investigate how they differ from Harlow U3A. The Association holds meetings twice a year where you can meet other like-minded members and share problems, solutions and good practice. Often there is an invited speaker at these meetings. Quizzes, Study Days and other interesting events are held during each year. Items can be posted on the website via the 'News' page.

East of England Region U3As:

Web address: <https://u3asites.org.uk/east-of-england>

There are 6 regions in the area; Suffolk, Bedford, Essex, Herts, Norfolk and Bedfordshire. Within these regions U3As total around 140. Each region has dedicated volunteers who have been trained to assist whenever a U3A requires it and who can help set up new U3As. Workshops are also being organised to help members keep up to date with any changes occurring with the National U3A organisation. The Regional Trustee is Jeff Carter who can be contacted via the website.

Subject Advisors

U3A subject advisers can help any new interest group or advise on problems in established groups. Listed below are many of the available subjects. Some have their own newsletters.

Advisers can only be reached by email through the website: www.u3a.org.uk

Click on Resources, then subject advice. The website is updated regularly. The following are examples.

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Archaeology	Architecture	Art Appreciation
Astronomy	Aviation	Ballroom Dancing
Biology	Bridge	British History
Canasta	Classical Greek	Climate Change
Crafts	Creative Writing	Current Affairs
Cycling	Exploring World Faiths	Film
French	Gardening	Genealogy
Geology	German	Humour
ICT Awareness	Jazz Appreciation	Languages
Latin	Living History	Literature
Mahjong	Maths and Stats	Memory Maint'nce
Military History	Mindfulness	Music
Opera	Painting/Drawing	Petanque
Philosophy	Photography	Play Reading
Poetry	Psychology	Racketball
Research	Russian	Sailing
Science	Shakespeare	Storytelling
Tai Chi	Theology	Walking
Wine Appreciation	Water Activities	Yoga
Walking Sports	Computer Use	British Sign Language

Items, such as CDs and DVDs can also be borrowed from the Resources Centre.

The Resources Centre no longer offers books and videos.

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HARLOW U3A GROUP EQUIPMENT/ASSET INVENTORY

NAME OF GROUP - _____ FACILITATOR - _____

Item #	Description	Date Purchased	Cost	Storage Place
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

All equipment **must** be labelled as the property of Harlow U3A. Please contact your Groups Coordinator for a label. Please send a copy of this form to the Groups Coordinator every time it is updated. All items purchased with Group funds costing more than £20 and expected to last more than 1 year must be recorded.

Page ____ of ____

Form Updated June 7th 2020

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Harlow U3A - Physical Activity Disclaimer Form

Physical activity is one way of staying fit and healthy. However, whilst taking normal precautions, providing reasonable help and assistance as necessary, neither Harlow U3A, nor the Leader/Organiser of the group can accept responsibility for any circumstances affecting the Health or Safety of individuals.

Groups organised by U3A Groups automatically receive public liability insurance cover through the Third Age Trust, provided the leaders are U3A members. This is designed to protect leaders against claims for damage to property and, injury or death which might have been occasioned during an activity. This is NOT a personal accident insurance and accordingly participants are responsible for their own Health and Safety and the safe keeping of their equipment, clothing and belongings.

Participants should follow the advice/instructions of the Leader to minimise any risk to themselves and should also ensure that they do not endanger any others in the party.

If you do have any of the following medical conditions you should seek medical advice before you commence any physical activity, e.g. walking, with the group

Heart disease

High blood pressure

Diabetes

Asthma

Emphysema

Chronic Bronchitis

Bone or joint problems

I have read, understood and accept the foregoing Disclaimer.

Please print your Name(s) in Block Letters, then Sign and Date below.

NAME(S) _____

SIGNATURE _____

DATE _____

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Expenses Claim/Cheque Request Form



Name:.....

Group:.....

Signed:.....

Date:.....

Expense Claim:

Cheque Request:

Date	Description	Amount
TOTAL		

Show actual miles, trip start and end points for mileage claims.

Expense Claim: attach receipts.

Cheque Request: attach invoice

For Groups Expenses –

Submit to Groups Treasurer.

For Committee/General Expenses -

Submit to Treasurer.

For Payment by Bank Transfer: Sort Code: _____

Account Number: _____

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[Home](#) > [Rates and allowances: travel - mileage and fuel allowances](#)



HM Revenue
& Customs

Guidance

Travel - mileage and fuel rates and allowances

Updated 4 July 2019

Contents

[Approved mileage rates from tax year 2011 to 2012 to present date](#)

[Passenger payments - cars and vans](#)

[Company cars](#)

[Company vans](#)

[Fuel charges - company cars and vans](#)

[Advisory fuel rates - company cars](#)

[Company car and car fuel calculator - company cars](#)

Approved mileage rates from tax year 2011 to 2012 to present date

From tax year 2011 to 2012 onwards	First 10,000 business miles in the tax year	Each business mile over 10,000 in the tax year
Cars and vans	45p	25p
Motor cycles	24p	24p
Bicycles	20p	20p

Form/Rate Validated January, 2023

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Incident Report Form

This form is to be filled in by a member of the committee, a group facilitator or property owner and should be retained on file by the U3A committee in case of a claim and for a period of three years even if a claim appears unlikely.

A YOUR DETAILS

Harlow U3A	
Name	Position
Telephone	
Address	
Postcode	

B INCIDENT DETAILS

Date of incident	Time of incident
Where did the incident occur?	
Please state the reason for the injured person or damaged property being there	
Please describe the circumstances of the incident Attach a sketch or photograph(s) if appropriate	

Incident Report Form

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C PARTICULARS OF PERSON(S) INVOLVED IN THE INCIDENT (continue on a blank page if necessary)

Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	
Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	

Sections D and E are to be completed for any incident involving injury.

D PARTICULARS OF THE INJURED PERSON(S) (continue on a blank page if necessary)

Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	
Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	

E DETAILS OF INJURY

Describe the injury/injuries
Immediate action taken
Treatment at the scene
Admission to hospital
Ongoing medical treatment

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Section F is to be completed for any incident involving damage to property

F DETAILS OF DAMAGED PROPERTY

Describe damage caused
Estimated cost of repair or replacement
Name of owner of damaged property
Telephone
Address
Postcode

The remaining sections are to be completed for all incidents

G NAME AND CONTACT DETAILS OF ANY WITNESSES TO THE INCIDENT

H DECLARATION

I/We declare that to the best of my/our knowledge and belief all the foregoing particulars are true and correct in all respects.	
Signed	Dated

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Risk Assessment Form

General U3A Activity Risk Assessment Checklist

U3A Name Harlow	
Interest Group	
Date Location/Postcode	
Nature and Description of Activity	

Part 1: Before the activity Group Facilitator Check list:	Yes (<input type="checkbox"/>)
A) The Facilitator must check the group members list (from Beacon) before every Group meeting and mark the names of the members who attended. The marked list must be kept for a minimum of 28 days.	
B) If the meeting involves travel or an outdoor activity the Facilitator must carry the group list, including contact details – preferably a mobile phone, and emergency contact.	
C) Consider and include a description the general hazards and risks related to the specific activity. These will be minimal where activities are indoors and essentially sedentary. Include the same language for each meeting – put the words on the attendance record.	
D) Activities that involve travel, outdoor activities and physical activity (indoors and out) should always be specifically risk-assessed for current/expected conditions.	

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Part 2: Before Activity Personal Checklist:	Yes (☐)
<p>A. If you feel unwell – stay at home.</p> <p>B. Consider the nature and place of the activity in respect of your fitness and ability to join in the activity comfortably.</p> <p>C. Review the risk check list for the activity above completed by the Group Facilitator and consider if you can take part without adverse risk to yourself or household.</p>	
Part 1. Activity Checklist outcomes:	Yes (☐)
Signed Group Facilitator:	Dated

Part 2. Personal Checklist Outcomes: