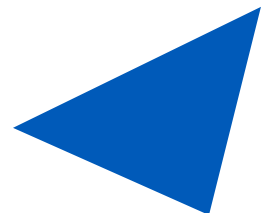


Contingency Planning

Aims

- To understand what contingency planning is and why it is important
- To explore areas of contingency planning that are important to u3as and what steps can be taken
- To share good practice and exchange ideas
- To identify the support, advice and guidance available

What is contingency planning and why is it important?



What situations might you need a contingency plan for?

- Unexpected illness of a Trustee, which could be the Chair, Treasurer, Membership Secretary
- If a Trustee decides to leave or needs to leave the Committee at short notice, or their term of office comes to an end
- Your regular meeting venue is no longer available due to a change in ownership
- Someone who is meant to be leading or helping to organise an activity is not available at the last minute, and they have the keys, contact information and or equipment

Ensuring continuity in your u3a

- Across committee and u3a roles and responsibilities
- Recording the responsibilities of each role
- Sharing of responsibilities
- Importance of keeping in touch with each other

Committee and u3a roles

- Chair and vice-Chair
- Treasurer
- Secretary
- Groups Coordinator
- Website Coordinator
- Membership Secretary
- Beacon Administrator
- Group Leader and many more!

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<div> <div> <div>Read Mode</div> <div>Print Layout</div> <div>Web Layout</div> <div>Draft</div> </div> <div> <div>Focus</div> <div>Immersive Reader</div> <div>Immersive</div> </div> <div> <div>Vertical</div> <div>Side to Side</div> <div>Page Movement</div> </div> <div> <div> <input checked="" type="checkbox"/> Ruler <input type="checkbox"/> Gridlines <input type="checkbox"/> Navigation Pane </div> <div>Show</div> </div> <div> <div>Zoom</div> <div>100%</div> <div>One Page</div> <div>Multiple Pages</div> <div>Page Width</div> </div> <div> <div>New Window</div> <div>Arrange All</div> <div>Split</div> </div> <div> <div>View Side by Side</div> <div>Synchronous Scrolling</div> <div>Reset Window Position</div> <div>Window</div> </div> <div> <div>Switch Windows</div> </div> <div> <div>Macros</div> <div>Properties</div> <div>SharePoint</div> </div> </div>			
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<h2>Individual Roles</h2>			
Role	Areas of responsibility	Who currently does this/supports or has access to relevant information?	Contingency plans
<i>Meetings Coordinator</i>	<i>Setting up the meeting hall for all meeting including bringing the necessary equipment and refreshments</i>	<i>Sarah has a list of what is needed for each meeting to ensure she brings everything that is needed, much of which is stored in her house</i>	<i>Sharing the list with other Committee members and seeing if there is an option to store any equipment at the meeting venue in a locked cupboard</i>
<i>Treasurer</i>	<i>Signing cheques</i> <i>Paying in money to the bank</i> <i>Bank account management/reporting</i>	<i>Bob, Barbara and Steph are all signatories on the <u>account</u></i> <i>Only Bob has the paying in book</i> <i>Only Bob can access the account online</i>	<i>Ensure signatories are kept up to date</i> <i>Ensure someone else, perhaps another signatory has the necessary information to be able to pay money into the account</i> <i>Ensure someone else, has a log in to the online account and there is more than one <u>authorised</u> user for the card reader (if used).</i>

Finance and data

- Storage of membership data and finance information, and who has access
- Use of generic email addresses
- Bank account access and signatories
- PayPal access (if used)
- Passwords

Succession Planning

- Having open Committee meetings
- Existing and previous Committee members sharing their experiences
- New member meetings
- Involving members on short-term working groups
- Ensuring a turnover of Committee members in line with your constitution
- Ensuring a staggered approach to terms of office finishing across Committee members
- Speaking to your Regional Trustee for support and those in your local networks

Advice, guidance & support

- Your Regional Trustee – [Contact & email](#)
- The Third Age Trust website: www.u3a.org.uk
- The Third Age Trust [newsletter](#) and [magazine](#)
- Local/Regional newsletters – Ask to see what you can sign up to
- Your local Networks or neighbouring u3as
- Regional and local events
- u3a Office – 020 8466 6139 or u3a.office@u3a.org.uk
- [Workshops](#) – National and local workshops



U3A

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