

SHARED PRACTICE GUIDE 021 – MANAGING FULL INTEREST GROUPS

Rev 01-2

1. INTRODUCTION

Shared practice guides (SPG) are a vehicle to share knowledge between the u3as in the London area. They are created by collating knowledge and experiences from those u3as. They are only a guide – what worked for one u3a might not work for your u3a. If in your experience something is wrong or you disagree with something in this guide, please write in to allow an update to be created and published. It's hoped these guides will grow over time with more shared experiences.

2. SCOPE

This particular SPG addresses the aspect of how to manage Interest Groups when they are full. Often a reason why new members don't renew their membership; often a challenge for Executive Committees; often an issue for current Group Coordinators/ Leaders.

3. BACKGROUND

The background to this issue is that many u3as often mention the challenge for them of managing full groups and waiting lists for those groups. This can create frustration for current members and is often sighted as the reason a member leaves (does not renew) their u3a.

The 'problem' is first to establish if there is a problem and it's scale and specifics; and then determine what to do about it. This SPG intends to address those two specific aspects.

Due to the scale of this common 'problem' the Beacon team have recently improved the functionality regarding 'Waiting Lists'.

4. LEARNINGS

The following section offers specific suggestions to all u3as of what to do (or at least consider) to help manage this collective problem (or challenge).

Appendix 1 provides a case study on this matter from one u3a. You might have your own 'evidence'.

5. SPECIFICS

5.1 Establishing the Problem

There is a general rule of thumb used nationally by u3as – a relationship of the number of groups offered by a u3a versus their membership size. Generally a good ratio is 1 to 10. 10 members for each group available. To grow your membership, offer more groups. With more groups on offer, more new members will join..... If overall you are way above this (eg 15 to 1) then this is the first indicator that you may have many groups that are oversubscribed. Constantly looking to start new groups helps keep the ratio down, avoids waiting lists, and attracts new members.

At a more granular level, even if you have a good general ratio, you may have waiting lists for certain groups (or types of group). Often a u3a, it's Groups Coordinator, or the full Executive Committee, are not aware if this is an issue for their u3a or not. Or if they are vaguely aware, they only have anecdotal data on the matter. Therefore the first stage is to obtain more exact data on the subject (so that the scale of the 'problem' can be established for your u3a).

For u3as not using Beacon this will have to be done in some form of manual form, eg asking Coordinators to report on their Waiting List sizes (if they know) or through a Members Survey or through some form of Exit Survey (of members not renewing).

For those u3as using Beacon (or having access to Beacon) – is the Waiting List function being utilised? The Beacon functionality has recently been enhanced but it is still optional. Currently each Group Coordinator/Leader can, in Beacon, tick (or not) to ‘Enable Waiting List’. If they do tick then under the Group’s Member list it shows the number, name and date when joining the waiting list.

Apart from then being useful information for the Group Leader, it also allows the overall Groups Coordinator and the Executive Committee to see how many groups are full and the extent of members waiting:

Select	Group	Active	When	Where	Coordinators	Members	Max	Waiting
A								
<input type="checkbox"/>	Ageing in 21st Century Group	Y	3.00 pm on Wednesdays every fortnight		Georgia Lepper	15	0	
<input type="checkbox"/>					Vivek Nanda			
<input type="checkbox"/>	All Things Have Standing	Y	6/10/23,3/11,1/12,2/2,1/3,5/4,3/5,7/6 & 5/7/24	Zoom	Vivek Nanda	9	0	
<input type="checkbox"/>	Art in London	Y	Once per month	Not fixed	Denise Reardon	126	150	5
<input type="checkbox"/>	Art: i-Pad Painting & Drawing	Y	Monday 10:30, every two weeks		Gill Hopkins	9	9	1
<input type="checkbox"/>	Art: Life Drawing	Y	Every Monday		Alison Shipton	19	22	
B								
<input type="checkbox"/>	Birdwatching	Y	Two visits per month	Not fixed	Janet Drake	91	500	
<input type="checkbox"/>					Derek Harwood			
<input type="checkbox"/>	Book Group - German	Y	Monday at 10:00, approx every 6 weeks	Gay	Vivienne Gay	11	12	
<input type="checkbox"/>	Book Group - Science Fiction	Y	Friday at 14:00, every five or six weeks	Evans	Jenni Chan	7	0	1
<input type="checkbox"/>	Book Group - Short Stories	Y	2nd Thursday of each month at 10:30	Morris	Gwen Morris	9	8	1

Should the activating of the Beacon waiting list function be left to each Group Leader or should the default be that this is always ticked? Some Leaders may not like the extra administration of managing a waiting list but is this not part of the role definition?

If not set at the default (or if Beacon not being used), should there be a regular request of all Group Leaders to advise how many they have on their waiting list – and what they are doing about it.

By one way or another it is recommended that each u3a should know the number of members waiting to get into groups. Waiting to get into a group causes current members to become disgruntled and some then leave.

Having established the scale of the problem, what to do about it? Some suggestions follow in the next Section.

5.1 What to Do About Full Groups

The above Section provides suggested methods to establish if your u3a has a problem regarding full groups and waiting lists or not. But knowing (or confirming) you have a problem might seem the easy part. How to solve that problem is the real challenge. This Section suggests some methods to try to then solve the problem.

5.1.1 Above provides the methods to provide detailed data to then target a solution. As per Appendix 1, it might be the first stage is to challenge the quality of the waiting list of a Group. Is it

current or have members changed their minds or have other commitments now. Through a conversation with members on a waiting list an understanding of their wishes can also be established. It maybe they want to join that specific type of group so the only answer is to try to establish a second similar group. But it might be established that a slightly different form of group – one that actually already exists – might suffice. You can suggest they try that instead.

5.1.2 If it is the same type of group that is required then the recruitment of a new Leader will be required. This could come from the current group – one of the existing group members being willing to replicate the base group. Or it might be someone on the waiting list might be willing to set up the new group – with support from the current group. Maybe they need support with the group admin to allow them to feel confident enough to offer to lead the new group.

5.1.3 The success of above may well depend on the type of group. Some (eg Languages) need a 'subject expert' and therefore it is doubly difficult to find a new Leader for the new group. But maybe the current group subject expert would be willing to support the two groups by devolving some of the admin to another group member. However some types of groups (eg Book Groups) do not really need a subject expert, and hence encouraging a member on the waiting list to start a new one should be easier.

5.1.4 The concept of 'Faculty Leads' can help in above. Beacon has the ability to categorise or group similar Groups and some u3as have a subject expert supporting all similar groups, all Groups in that Faculty.

5.1.5 Another option if a subject expert can't be found within your membership is to consider using online material. There is a wealth of material online covering every subject. This works particularly well for discussion type groups. It still needs a Group Coordinator/Leader to administer the group but even the research and proposing the material, can be shared to all group members.

5.1.6 In the suggested conversations with current Group Leaders with waiting lists, it might be that moving to a bigger venue to allow more members to attend, is a possibility. There might be a need for funding support (paying for venue hire, rather than a free members home). But the Executive Committee might deem this preferable to keep or grow their groups' offering.

5.1.7 Another option, if the limitation is venue size, is to consider making the group meetings 'hybrid' – partially face-to-face and partly online (eg through Zoom). Of course this will only be suitable for some type of groups, but we've seen through the pandemic period how it's possible to do even things like ballroom dancing through Zoom.

ANY OTHER SUGGESTED METHODS TO HELP MANAGE, & IDEALLY SOLVE THE PROBLEM?

TRIED AND PROVEN METHODS?

6. REFERENCE MATERIAL

There is no specific detailed guidance on this subject available currently through the national u3a website. However there is quite a lot of general 'Committee' guidance documents on running a u3a. These can be accessed here:

<https://www.u3a.org.uk/members-area/support/advice-and-guidance#policies>

7. CONTACT POINT

Unless there is someone else willing to take on this role, then if you want further guidance on the topic please contact Derek on: vchairn.londonregionu3a@gmail.com

APPENDIX 1: An Example – Managing Waiting Lists

An independent report:

1. Following the discussion at the Executive Committee on waiting lists/closed groups I have reviewed the current state of the membership of the International Affairs group. This group probably has the longest waiting list in Beacon in relation to its formal membership. So these comments may be useful for whoever is looking at the waiting list problem as well as a small case study on aspects of how groups sometimes work.
2. This group was set up by the current Group Coordinator in January 2016. It evolved from an identical group set up by the same Coordinator in 2013 in the very early days of iu3a drawing on the experiences of similar groups in other U3As. This earlier group discussed the institutions of the EU and then the Middle East. It has always met once a month on the same day and at the same time for up to two hours in the Coordinator's house. This meant restricting membership of the group to a manageable number for the space available in the house. This has been set at 12/13 since inception on the assumption that regular attendance would be no more than 10 which is the actual normal seating capacity. The group has not incurred any costs since inception.
3. The membership has remained remarkably steady over the years and vacancies arise very infrequently. Of the current (November 2023) members of the group (11) seven have been in it since inception in 2016 with another original member having only just left in 2023. There have been 20 joiners since then. The group is very interactive with all members expected to contribute actively both through discussion and occasionally presenting a researched but short paper on a relevant topic of their choice to the group to start the monthly discussion. All members have equally valid comments to make. It does not have any outside speakers and there are no experts in the group. It is a typical U3A self-learning group.
4. The group met regularly throughout the Covid period using Zoom. In effect this meant being able to have a slightly higher membership since physical meeting space was not an issue. Following the Covid lockdowns it has continued as a hybrid group. However it has been noticeable that fewer members are now participating through Zoom preferring to meet face to face. In the first half of 2023 Zoom participants averaged 21% of the attendance and in the second half of the year this had declined to 12%. It should be noted that two members of the group regularly use Zoom when they are frequently outside the UK. Overall for the calendar year 2023, the average meeting attendance was 8 members attending face to face and 2 on Zoom with 2 apologies.
5. The coordinator regularly discusses with the members their views on how the group is run. It is clear that "sociability" is very highly rated, hence the decline in Zoom participation, and there is little appetite for expanding through having more Zoom participants. This would also require upgraded technical facilities. So the option of having Zoom only members will not be taken forward. However where a potential member has an access problem Zoom only membership will be considered.
6. Currently the International Affairs group has, according to Beacon, 11 members, one vacancy and 19 on the waiting list. As none of the existing members wish to organise a second group, the Coordinator has written to all those on the waiting list to ask them if they want to remain on it. Of the 16 who replied 12 wish to be removed and four wish to remain with three not having replied. The most common reason given for wishing to be removed was not realising they were on it either because they said they had definitely not signed up in the first place or they had forgotten they had done so. Accordingly the waiting list from January 2024 will be reduced to four by removing the decliners and non- repliers. Very recently one additional member has joined the waiting list giving a

new total of five. With one vacancy and the possibility of another total membership could be 13, the top end of what is physically possible for the location.

7. Although the group has had very few vacancies over the years, it is noticeable that when a new member does join, sometimes they drop out soon afterwards. Only four of the 20 joiners since 2016 are currently in the group with the latest one starting in February 2022. There seem to be two main reasons for this. Despite the up-front description of the group as participative new members sometimes have not appreciated that this does mean actually participating not just listening, and so leave. None of the members who have joined have been introduced by an existing member. On one or two occasions new members have said they have not felt as welcomed as they would have liked. So much more attention to preventing this will be made in the future when new members join. More broadly not feeling welcome is often mentioned as a common problem in groups of long standing with limited numbers of new joiners.

8. A closer analysis of the 20 who joined the group after it started in Jan 2016, were entered into the Group's formal membership and subsequently left shows the following:

- a. Three joiners received notice of their first meeting, they did not attend and nothing was heard from them subsequently.
- b. Four joiners moved away from the area and their iu3a membership lapsed.
- c. Three joiners left the group for medical reasons.
- d. Two joiners resigned for reasons not associated with the group.
- e. No reason was recorded for the remaining eight leavers.

9. The eight leavers for whom there is no reason given attended between one and four meetings, averaging just under three meetings, before they left. None had volunteered to present a paper to the group.

10. EDI considerations. iU3A does not ask members for diversity information so the following is based on observation. The Coordinator is male. The other 10 current members are six female and four male. The 20 joiners were split 15 female and five male. As a whole iu3a is 75% female and 25% male. Access to the basement room where the meetings are held is down a flight of nine steps from street level. All members bar one since inception have been/are seen as White European which is not untypical of iu3a as a whole.

11. On one previous occasion, with no existing group member, with support from the coordinator, willing to set up a second group, the coordinator attempted to facilitate the formation of a second International Affairs or similar group from those on the group's waiting list. This proved to be a failure with the main reason being the lack of an active potential coordinator. It was also commented that a second group suggested, incorrectly, some sort of second class status. In fact the intention was not to replicate the existing group as it was open to the new group, with a separate coordinator, to organise themselves in whatever way they agreed.

12. As to why 20 members joined the waiting list, using the new Beacon facility giving the date on which they did so, showed that this was concentrated into two particular periods. Eight joined at around October 2021, the date of the last Open Day, and seven joined around February 2023 of whom three came to the Renewers event (for new members who had just renewed their membership) held in that month.

Report by:

Chris Bulford, Islington u3a, December 2023.