



# Role description – Groups Coordinator

**Key to additions:** Seaham (Jan Leach), Coquetdale (Sue Willoughby), Prudhoe (Kathy Clegg/ Jean Thomas) other inc. Cestria (Anne Lanigan). [Anything in square brackets is queries from Kathy] Berwick (Helen Atkinson) Northallerton (Alastair McMinn)

## Category: Recruitment

### 1. Document purpose

To outline the role and responsibilities of a Groups Coordinator. This document is to be used as a template for u3a Committees to amend depending on the specifics of this role in their u3a.

### 2. Role summary

To facilitate the setting up of new interest groups through supporting and advising the Group Convenors/Leaders and ensuring good communications between group members, the Committee and the u3a as a whole.

#### Key Tasks

1. To support established groups
2. To encourage and promote the formation of new groups
3. To keep the committee and members informed.

### 3. Skills and Experience

- Enthusiasm for u3a interest groups and a passion for setting up and supporting interest groups.
- Organisational skills and comfortable using technology for sending emails, and collecting and managing data.
- A team player, this role will be part of the u3a committee.

### 4. Main responsibilities

Some of the responsibilities listed here may be shared with other u3a members, for example by having a deputy/assistant. Where the Groups Coordinator role is a member of the u3a committee (trustee) there are also additional statutory requirements and responsibilities of trustees.





Please note

- The specific tasks listed below are in addition to the statutory requirements and responsibilities of all trustees of charitable organisations in the UK as laid down by the charity regulators.
- Some U3As may decide to delegate some of these tasks to other members of the Committee.
- Some U3As will use different terminology e.g. group convenors, group facilitators etc.

#### **4.1. Setting up and supporting new groups**

- Gathering input from members on suggestions for new interest groups.
- Inviting members' suggestions for new interest groups, discussing options with them and encouraging interested members to set up a group themselves with the workload being shared.
- Encouraging members with known skills and interests to become group leaders.
- Support in setting up new interest groups e.g. making lists of interested members, having 'sign-up' tables at monthly meetings, arranging start-up meetings etc.,
- **To encourage, promote, and accept requests from members for the formation of new groups and to gauge when there is sufficient interest to enable a viable group start-up. To arrange signing up sheets for Groups thus suggested.**
- **Recruitment, induction and ongoing support for new Group Convenors/Leaders.**
- Attend initial meeting of a new group, help them with any problems, keep an eye on things going forward. Assisting with initial stages of new groups so that Group Leaders are clear what they are doing/need to do
- **I find venues, organise suitable times and liaise with the venue person, so that GL role is as easy as possible.**
- Contact and responsibility for new group proposals or requests. Determining requirements for the proposed group including frequency, days, times, venue and equipment and preparing an analysis to determine costs and viability for approval by the committee.
- **To organise and take the Chair at the initial meetings of each new group and to assist the group to find and appoint a suitable Convenor.**
- **To ensure that new Group Convenors are fully acquainted with the appropriate U3A operating procedures. A Welcome Pack for Convenors is available.**
- Maintaining regular contact with newly established groups to discuss and review progress.
- Introducing new group leaders to existing group leaders doing similar subjects.
- Helping to publicise new groups via the local u3a website, newsletter, monthly meetings etc.
- Maintaining regular contact with groups and providing support with any challenges.
- Monitoring and collecting information about group numbers and where there are waiting lists encouraging members to start new groups.
- Organising the timetable of interest groups to allow for maximum participation
- Facilitate and coordinate new and existing groups





#### **4.2. Providing support and advice to Group Convenors/Leaders**

- To provide a copy of the Group Convenor/Leader handbook or guidelines to all Group Leaders/Convenors (there is a template handbook available on the [u3a website](#)), and copies of relevant forms e.g. incident report forms, expense claim forms (some of these are available to download from the [u3a website](#)).
- Oversee the production of a handbook/set of guidelines for group leaders, to cover amongst other things:
  - venue hire and payment.
  - managing group monies
  - policies and procedures eg. Safeguarding, GDPR, Equality, Diversity and Inclusion
  - accident and incident reporting.
  - use of equipment.
  - dealing with problems.
  - group members and communicating with group members
- Ensure that group leaders have a copy of the handbook or guidelines as well as access to or copies of all relevant forms e.g. accident reports, expense claims.
- Try to update all GL info on website as needed, including policies.
- Organise risk assessments with GLs
- Liaise with treasurer re cost, payments etc.
- Set up group members polls on Beacon so it is easy for GL to send emails [?]
- Maintaining a list of local venues for groups
- Liaison with the committee over selection of alternative room hire from various venues for best usage of facilities and associated costs.
- Responsibility for arranging, amending or cancelling bookings for all venues [unless otherwise agreed] and for the checking of venue invoices which are subsequently sent to the u3a Treasurer for payment. (This includes the AGM, Committee Meetings, Group Leader Meetings, Monthly Meetings as well as Group meetings.)
- Preparation of the budget for Group contributions to meetings in association with the Treasurer.
- Ensuring groups are accessible to all members
- Ensuring that Group Leaders are aware of how they need to protect members data and the requirements of GDPR [+ other u3a policies? e.g. Safeguarding; Diversity and inclusion; others?]
- Ensure that Group Leaders maintain a register of members and that it is completed at every meeting for health and safety.
- Responsibility for the updating of the Contacts List for the Newsletter and for updating members/ group leader details on Beacon. This also





includes creation of new groups on Beacon once approved by the committee. Ensuring that group maximum numbers included on Beacon.

- Informing Group Convenors/Leaders about the resources available nationally including [Third Age Matters Magazine](#), [national newsletter](#), [Sources](#), the [u3a website](#), and [Subject Advisors](#).
- Inform group leaders about the educational resources available nationally including from national offices, Sources and Sources online, national website, subject advisors and the resources available online e.g. MOOCs, U3A online etc.
- To inform Groups of equipment available for loan
- Being the first point of contact and provide support for any queries, problems, challenges that might arise in the running of an interest group, to resolve any minor conflicts that might occur in groups, referring more serious matters to the Committee.
- To be the contact and provide assistance to Group Convenors who are experiencing difficulties in their group, or problems that might arise in running the group.
- To support and advise existing Groups as necessary
- Holding regular Group Convenor/Leader meetings so knowledge, issues, problems, challenges and new ideas can be shared and discussed. - annual or 6-monthly? with catering, coffee mornings or lunches as appropriate.
- To organise an annual social event for group leaders to show appreciation for their contribution to the U3A.
- Pooling ideas between Group Leaders on how to run
- effective groups and anything else they wish to discuss
- And anything else to help groups run!
- Encouraging shadowing and handover for Group Convenors/Leaders who have decided to move on from their role.
- To advertise 'vacancies' for group leaders when existing ones retire
- Ensure all groups have Group Leaders.

#### **4.3. Communication and administration**

- To maintain accurate details of your u3a's interest groups.
- To maintain an accurate programme of interest groups, including title, content, frequency, venue, day and time and the contact details of the leader.
- Preparation of the annual diary for all groups which is then vetted by Group Leaders before provisional bookings are made for the year.
- Ensure the Newsletter, Web and Facebook editors are made aware of changes to monthly schedules to advise members accordingly.
- Maintenance of Forum noticeboard with updated u3a news and information.
- To collect information on group numbers, members and vacancies [via Beacon] and ensure the membership secretary is kept fully informed.
- Monitor changes to groups



- Group Leader and contact details through Beacon
- Meeting Days and Times
- Venues
- Costs, linking with Treasurer re contract costings etc
- Keep details up to date – send amended copies to Secretary, Membership Secretary, Chair
- Email Website Coordinator with precise details of changes to be made
- To liaise with Group Convenors/Leaders and provide the committee with updates on the progress/development of interest groups.
- Valuing Group Leaders and presenting their views to the Committee
- To communicate any relevant information to Group Convenors/Leaders from the committee, local networks, the region and or the u3a Office.
- To encourage and assist Group Convenors/Leaders to share the activities of their groups via their u3a website, in local press and national communications.
- To encourage and assist group leaders to promote and profile the work of their groups via the website, Sources, Sources online, the Trust newsletter, through local press and social media and Third Age Matters.
- To liaise with the Group Convenors in order to prepare reports on their activities for the web-site, committee meetings and members' meetings.
- To present such reports at committee meetings and at members' meetings.
- To ensure that relevant committee decisions are communicated to Group Convenors and that any group issues are brought to the attention of the committee.
- To assist maintaining an up-to-date timetable of group activities [what does this mean – just meeting times, or details of the individual meetings? This seems to vary between u3as] for the web-site.
- Monthly timetable [what is this?].
- [to maintain the database of members and the groups to which they belong (useful in case of illness etc so that their convenors can be informed) *superseded by Beacon*]
- To use Beacon to store details of the above.
- To provide a monthly report to the committee – may include getting a brief monthly report from each GL, which does bring in lot of new group members.

**Other – mostly encouraging members to join groups:**

- to keep a record of whether groups are full or have spaces, and to publicise that at the u3a meetings
- to encourage u3a members to join groups and to link them to the relevant convenor
- Organise group leader input to membership morning [what is this?] or 'Open Day' – promoting the groups to members who may not know about them
- At the AGM after the business, arrange a slide shows of all the groups with the opportunity to talk about it and get information to all the members
- Retain, update Interest Sheets [I'm not quite sure what these are – interest in potential new groups, perhaps?]



- Collect annual programmes where applicable – post on Notice Board, send to Secretary
- to consider succession planning and try to identify who might take over as the next Coordinator
- To carry out a comprehensive handover to a new groups' co-ordinator when applicable.

There is a wide range of support and training available for all Groups Coordinators from your u3a's committee to online workshops, and a wealth of information on the [u3a website](#). More information about this is available in the document Interest Groups Matters, available to download on the u3a website.

<b>u3a</b>	<b>Role description – Group Coordinator</b>	
<b>Version</b>	<b>Description of changes</b>	<b>Date</b>
2.0	Updated formatting	18/11/2021
3.0	Addition of links and clarification of information	16/02/2023
ongoing	Addition of info from individual u3as	May 2023 onwards