

South Lakes U3A: Guidance for Group Coordinators

1. Introduction

Interest and activity groups are the core of South Lakes U3A (SLU3A), at the moment (Nov 2021) there are in excess of eighty active groups, they have all been formed and sustained by the interest and enthusiasm of their members. This is a dynamic organisation, over time some groups will close for lack of interest or other reasons and new ones will form.

These notes are intended to provide general guidance on the role played by coordinators both in looking after their groups, setting up new ones and their responsibilities to SLU3A and to those who participate in their group.

The Coronavirus Pandemic has made a big impact on all of our lives and the way in which SLU3A functions. The regulations governing our behaviour constantly change so reference has been made to these in specific sections rather than as a general heading.

2. South Lakes U3A

SLU3A is an independent charity registered with the Charities Commission and operating under the umbrella of the National U3A. It is run by a committee of volunteers elected annually at the AGM all of whom are automatically trustees of the charity. Details of the Constitution and other administrative documents are available on the website <https://u3asites.org.uk/south-lakes> Members pay an annual fee which covers 12 months from September each year, the fee is reviewed annually by the committee.

3. Group Coordinators

Every interest or activity group has one or more designated Coordinators who take on responsibility for the general running of the group, any group finances and its relationship with SLU3A. Groups are encouraged to have at least two coordinators who share the role between them. This provides better cover if one is on holiday or temporarily incapacitated and also eases the transition when an existing coordinator steps down and someone else takes their place.

4. Role of the coordinator

The general role of the coordinators can be broken down into a number of areas which are covered in more detail later in these notes

- a) Group membership
- b) Meeting venue (if appropriate)
- c) Programme

- d) Attendance records
- e) Fees and expenses
- f) Communication

None of these are particularly difficult or time consuming but do help the group to run smoothly

5 Group Membership

The Group needs to keep records of its members to

- a) Ensure that they are all current members of SLU3A and that the membership has been renewed after September each year.
- b) Use SLU3A membership records so that programme details can be easily circulated to members of the group and amended when necessary.
- c) Ensure that it is easy to check that members attending any meeting are all currently part of the Group. In small groups this is easy but some can become very large with in excess of 100 members on their membership list.

Groups can keep their own records either handwritten or on a personal computer. However, the Committee encourages groups to use a database service which is provided by SLU3A, this is called Beacon. The system has been developed by National U3A but the part used by South Lakes is entirely separate, independent and secure. The system is easy to use and can be accessed from any computer, tablet or smartphone. This has a number of advantages both to the group and to SLU3A.

- a) Full member details are automatically available.
- b) It simplifies passing on information to a new coordinator
- c) It shows if membership is paid up to date so there is no need to check individual membership cards.
- d) Emails sent to all or part of the Group are automatically treated as BCC so the recipient can only see their own and the senders email address. This is more likely to comply with Data Protection regulations.
- e) Beacon can be used to generate sign-up sheets for meetings.
- f) It helps the committee to monitor the size of groups.
- g) The coordinators will all be using the same information.
- h) Membership details are more likely to be kept up to date to the benefit of everyone.

If anyone requires help with using Beacon then please contact our Database Administrator at <mailto:beaconslu3a@gmail.com>

Some groups set a limit on the number of members that they will accept usually dictated by practical considerations such as size of venue, for outdoor groups the size of the party and so on. Where appropriate a waiting list of new members can be established and then used to fill vacancies as they arise.

6 Venue

Some groups, for example walking or cycling, do not need a formal meeting venue however most of our groups do. Some small interest groups meet very successfully in private houses but the majority require a meeting room of some sort. There are a variety of venues available in Kendal and surrounding areas, established groups usually have a settled “home”.

Group coordinators need to liaise with the appropriate contact for their premises and ensure that the location is booked well ahead to fit in with their programme.

Groups do not directly pay the cost of hiring the room that they use instead this is settled by the SLU3A Treasurer from central funds. Members pay a small charge for each meeting towards the cost, this is dealt with in more detail under **Fees and expenses**.

Coordinators need to ensure that the Group complies with all requirements imposed by the venue. For example, security, washing up, fire drills, stacking chairs and tables etc.

The group must also comply with regulations relating to the Coronavirus Pandemic both those imposed by the Government or Local Authority and any specific requirements of the venue itself. Additional guidance on Covid 19 has been provided separately to the coordinators.

7 Programme

Groups arrange their own programme to suit their individual requirements. Some do this for a year in advance, others meeting by meeting or any variation that suits them.

Coordinators need to communicate the programme details to their members usually by email. It is strongly recommended that all emails are sent out with the recipients address hidden using the BCC function that is available on all mail systems, Beacon is ideal for this as the function is used automatically.

Details of the programme can also be added to the SLU3A website either by updating them on Beacon or by passing them on to the website manager at webmaster@southlakesu3a.org.uk

In addition details can be included in the Annual Handbook or the quarterly newsletter by contacting the editor at newsletterslu3a@gmail.com

8 Attendance records

The coordinator(s) need to monitor attendance numbers for a variety of reasons.

It may be necessary to supply details of the members attending a specific meeting to NHS Test and Trace in relation to Coronavirus monitoring.

Periodically they can look at the attendance record of individuals and for those not coming regularly check if they still want to be members of the group.

SLU3A is a charity and needs to be transparent in the collection of money, coordinators should be able to demonstrate that they are accounting for the cash that the members pay for meeting room hire. This means that there should be a record of attendance that can be referred to if necessary, these should be discarded when they are no longer relevant and probably not kept for more than two years.

Finally the insurance cover provided by National U3A requires that records of attendance are kept, again being destroyed when they are no longer relevant and probably not kept for more than two years.

9 Fees and expenses

Groups that meet in a venue hired from a third party need to collect room contributions from those attending meetings, group members who are unable to attend a particular meeting are not required to pay. The policy relating to room fees is reviewed annually by the committee prior to the AGM each year. At the moment (November 2021) this is set at £1.50 per person per meeting but may obviously change as time goes by.

Coordinators should collect and check the cash against the attendance records and periodically transfer the cash to SLU3A Bank Account by BACS or send a cheque for the amount collected to the Treasurer. This should be at least once every two months or if the total collected exceeds £500. There is a Group Income Return available to print off on the website <http://www.southlakesu3a.org.uk/documents.php> which contains instructions and should be submitted each time you transfer cash.

The form also requires a summary of the number attending each meeting to be included.

All those attending meetings should be paid up members of SLU3A but non members can come as visitors if they want to get a feel for how the group operates with a view to joining once they have sampled it. A maximum of two visits per person is allowed under the terms of the insurance policy that covers us, visitors should pay the meeting charge of £1.50 if appropriate.

Some groups provide refreshments during meetings with a small charge made to cover costs, this is entirely a matter for the group and no details or money need to be submitted to the Assistant Treasurer.

Legitimate expenses relating to the group should also be reclaimed on the Group Income Return supported by a receipt where possible.

Some groups regularly organise outings to cultural events, restaurants, activity centres or other venues. Finance for these should not be organised by individuals using their own bank accounts since this invalidates the Public Liability insurance cover. Please talk to the Treasurer or about how to deal with this if you do not already have established arrangements.

10 Communication

SLU3A consists of a diverse group of individuals, in its early years communication was largely by word of mouth and written material sent by post. The number of members has risen enormously and so have costs for printing and postage. Written material has to be physically put into envelopes and distributed which is a continuing organisational problem.

The most obvious solution is to switch to electronic methods based around email and the website. Most groups use email for their own contact purposes supplemented by phone calls to members who are known not to have internet access.

For wider communications the Committee have changed to an annual printed Handbook still distributed by post supplemented by electronic newsletters once a quarter and greater details of activities on our website. Copies of the quarterly Newsletters are printed and circulated to all members who do not use email. Periodic "Newsflashes" will be sent out as the need arises.

Coordinators should "encourage" group members to notify the membership secretaries of changes in their contact details, particularly their email address.

11 New Groups

The committee are very keen to support the formation of new interest groups and will provide practical support and some financial support in the early stages. The Vice Chair has specific responsibility for Interest Groups, please contact them for additional help. vicechair@southlakesu3a.org.uk

12 Annual Coordinators event

Once a year the committee organises a gathering to which all coordinators are invited usually afternoon tea or a coffee morning. This is an opportunity to thank everyone for their hard work and enthusiasm and to meet and talk with other coordinators and members of the committee.

13 Annual Open morning

An Open Morning is usually arranged each year in early September this provides Groups with an opportunity to recruit new members or simply talk about what they do to existing SLU3A members and visitors.

14 Useful contacts and additional information

Members of the committee are keen to help with new or existing groups, the Vice Chair has specific responsibilities to look after Interest Groups and the Treasurer or Assistant Treasurer will provide guidance on financial matters.

Useful SLU3A email addresses are

Chair	chair@southlakesu3a.org.uk
Vice Chair	vicechair@southlakesu3a.org.uk
Secretary	sec.slu3a@gmail.com

Treasurer treasurer@southlakesu3a.org.uk

Assistant Treasurer slu3aassistanttreasurer@gmail.com

Membership Secretary membershipsecretary@southlakesu3a.org.uk

Information on SLU3A including documents and contact details are included on the local website <https://u3asites.org.uk/south-lakes>

Other local U3A organisations and their websites are

- [Ambleside and District](#)
- [Cockermouth](#)
- [Furness \(Ulverston, Dalton and Barrow\)](#)
- [Grange and District](#)
- [Penrith and North Lakes](#)
- [Lancaster and Morecambe](#)
- [Whitehaven \(West Cumbria\)](#)
- <http://settledistrictu3a.org/>

Regional and national websites

- [The Third Age Trust](#). Our parent organisation.
- [NW Regional U3A organisation](#)