

## Guidelines for Convenors (July 2023)

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**1 Introduction.** Thank you for helping with one of Taunton U3A's study/interest groups. They are the heart of this U3A and vital to its continued wellbeing, therefore the committee will do all that it can to help you and your group. These notes are part of that help and aim to assist you in starting up and in continuing with your group. If you feel that there are things missing from the guidelines or that they should be improved in any way please inform your Group Coordinator.

Taunton U3A is a charity with its elected committee members as its trustees. These trustees are responsible for all aspects of the operation of Taunton U3A including its study/interest groups. Therefore, all study/interest groups have to be formally approved by the U3A's committee in order for the group to be recognised, insured and supported.

**2 Principles.** Taunton U3A is a member of the Third Age Trust, a self-help learning cooperative. The Trust's Aims and Principles are summarised in Annex A, the National U3A web site [www.u3a.org.uk](http://www.u3a.org.uk) or in various Third Age Trust publications. Taunton U3A's study/interest groups are expected to be self-help cooperatives in their own right; in particular they are expected to be self-financing and self-taught as far as is possible. Notwithstanding the expectation of self-financing the U3A's Committee as trustees of the charity needs to be aware of the activity taking place and of its financial state. Your immediate contact on the Committee is the Group Coordinator.

### **3 Organisation of Groups.**

- Taunton U3A's groups vary in size from around half a dozen members to more than fifty. They decide their own organisation, programme and meeting place.
- Whilst not essential, it is helpful for the convenor to have a deputy together with someone to keep a register of attendance. The register is important as a record of who is present at each meeting and of attendance trends.

- (c) When groups meet in a hall it can be helpful to have a nominated member to collect the agreed fee per meeting and keep simple accounts (see paragraph 6). The Treasurer will give you a paying-in book so that the fee can be paid into the U3A account. The Treasurer will pay the invoice using these funds when it is received.
- (d) A Convenor may allow a guest who is not a member of Taunton U3A to attend no more than two meetings of a group. After that the non-member must join Taunton U3A if he/she wishes to continue to attend meetings.
- (e) Following advice from the National Office concerning insurance being invalidated where non-members are present at events outside 'taster' sessions, it has been agreed that non-U3A members can come to meetings or on social trips on a temporary membership. If a non-paid carer came, then s/he would need temporary membership and if a paid carer, then s/he had to provide details of his/her own insurance. The form to cover this situation is attached at Annex D. Temporary membership can only be offered twice, and thereafter the individual has to become a paid-up member.
- (f) Where a member of a group has not attended meetings or sent apologies for a maximum of three months, the Convenor should attempt to contact him/her in order to ascertain whether or not a return is anticipated in the near future. If the Convenor is unable to contact the member, then the place can be filled from the waiting list.
- (g) If a group has a difficult member whose behaviour is regularly disturbing other members of the group, the Convenor should in the first instance approach the Groups Co-ordinator for help. If there is a serious problem in a session, it is quite acceptable to ask a member to leave the meeting, but the Groups Co-ordinator should be contacted as soon as possible after the end of the session. Convenors do not have the authority to expel a member from a group permanently, but may temporarily suspend him/her until a resolution of the problem is reached: should the problem not be resolved despite the help of the Groups Co-ordinator, then the Committee must be informed. Should the Committee decide that the member may continue in the group, if the Convenor refuses to re-admit the member, the Convenor cannot continue to run that group.

**4 Communication.** Good communication is key to the success of any organisation. Convenors should ensure that every member of the group knows the group's programme and who to contact for various eventualities such as having to miss a meeting, needing a lift or wanting advice on something that the group is doing. Communication is also important on a wider scale and this is why Taunton U3A has its own newsletter and its own web site. The newsletter is published quarterly (see Annex B) and includes articles of general U3A interest plus the diary of group meetings that most members find invaluable. Do please play your part by making sure that the group's meetings are published in it. Taunton U3A's website is at [www.u3sites.org.uk/taunton](http://www.u3sites.org.uk/taunton) and has useful information on Taunton U3A. Please let the webmaster have some information on your group so that it can be included.

Convenors are vital links in the communication chain that runs between the individual U3A member and the U3A's committee and the Third Age Trust. You can help by passing on to the committee any suggestions or general issues raised by members but from time to time you will also be asked to pass on information about special U3A events or other matters that may be of importance to members; please be a strong link in the communications chain.

**5 Loan for rent.** An advance payment of rental for premises can be arranged as long as there is a commitment by the group members to repay this loan during the course of the year in which it is incurred. Apply to the Treasurer for approval.

**6 Groups and Money.** As stated in paragraph 2 Taunton U3A's groups are expected to be self financing. Nonetheless the groups are part of the U3A and need to conform to good practice in their finances. As a general principle any expenses incurred by the group should be shared equally by its members and convenors should make sure that every member of the group knows

this. Some groups have very few expenses other than refreshments but others may photocopy material for meetings or incur other costs. For some groups the expenses can be significant because they meet in a hall and have rent or the occasional speaker to pay.

The Treasurer will advise groups on request but all members need to be aware of some important points:

- (a) When a group has expenses they should be recorded in simple accounts.
- (b) All monies collected by a group must go through Taunton U3A's bank account, apart from a small float for refreshments etc.
- (c) Significant expenses should be agreed by the group's members before the money is committed.
- (d) When halls are rented they should be booked in the name of Taunton U3A rather than in the name of an individual. This helps to protect you in the event of any dispute and may have financial advantages; for example reduced rent because we are a charity.
- (e) Groups hiring halls normally build up a small surplus to allow for the occasional meeting with low attendance.
- (f) There are financial and other risks involved when groups organise visits, holidays, theatre trips, etc and the U3A produces guidance which helps organisers to minimise the risks. Groups should consult the Committee on these.
- (g) Organisers of outings or similar activities are advised to get those who plan to attend to pay in advance.

**7 Payment to Tutors and Instructors.** U3As are self-help learning cooperatives where "Those who learn should also teach and those who teach should also learn". Therefore groups do not normally use tutors or instructors who are not members of U3A although some do invite occasional non-U3A speakers and pay a fee or expenses. It is unusual for groups to use tutors or instructors on a regular basis and when this is done great care is needed to keep within the law and ensure that there is proper insurance cover for the group's members. If a group feels that a regular non-U3A tutor or instructor is needed the Secretary should be consulted on the essential insurance and tax documentation required.

**8 Members' Personal Information.** You must by law respect the privacy of members and protect any personal information entrusted to you. Therefore, groups should be careful of any lists of names, telephone numbers or addresses that are held and this should include using the blind copy (bcc) facility when e-mailing several members. Additionally, if you include 'Taunton U3A' in the title of any e-mails it helps members to identify and sort them. For further information on Taunton U3A's General Data Protection Regulation, together with our Privacy Policy, please see the Website.

**9 Publicising Group Programmes.** Groups are not private clubs and meetings should be publicised for all members of the U3A to see. This is achieved through the U3A Newsletter and website and convenors should cooperate with the Newsletter Editor and Webmaster.

**10 Disabled Members.** If a disabled person wants to join a group and it is perceived that there might be a problem of access or some other concern, the issue should be discussed with the Group Coordinator, who will advise on the issue raised.

**11 Waiting Lists.** If groups are full the convenor should keep a waiting list of members who want to join. Keep the Group Coordinator informed as a new group can be formed.

**12 Accidents.** Accidents do happen from time to time and some of these can lead to complications for the individuals concerned and the possibility of insurance claims. Should an accident occur during a U3A activity then an Accident Report should be completed and lodged

with the Secretary. An Accident Report Form is attached at Annex C and is also available on the National U3A web site.

**13 Risk Assessment.** There can be risks associated with even simple activities but these can be minimised by simple checks and proper preparation. The Third Age Trust has produced advisory risk assessment forms for venues, workshops, walking groups and some others. These check lists are available on the National U3A web site. Convenors of groups that include physical activities or visits, in or out of doors, should give suitable warnings to their members (rough walking, sensible shoes, stiles, physical ability required etc,) and ask that members share mobile telephone numbers and carry the name and address of a suitable friend or relation in case of accident. Leaders of walks and similar activities are advised to carry a mobile telephone and ensure that it is known to every member taking part.

**14 Insurance.** There is a National U3A Public and Products Liability Insurance which provides public liability insurance cover for all U3A members during U3A activities. .A copy of the current insurance certificate together with the most recent information and guidance on U3A insurance can be obtained from the Secretary.

## Annex A.

### The Third Age Trust

The following is a reminder of the aims and principles of the Third Age Trust as they relate to groups. The Universities of the Third Age in the United Kingdom are autonomous, self-help organisations run by the voluntary efforts of their members. They are funded by the subscriptions of their members. All U3As are members of the Third Age Trust (a registered Charity) which is their national support and advisory body. All affiliated U3As pay a capitation fee to the Trust.

The word '**university**' is used in its original sense of people coming together to share and pursue learning in all its forms.

**Aims:** To encourage, generally, middle aged and older people who are not in full time paid employment to share knowledge, skills, interests and experience and to demonstrate the enjoyment and benefits of learning throughout life.

**Principles :** Activities should reflect the members' wishes and satisfy the widest possible range of interests utilising resources from own memberships, the Trust's support and outside organisations and using new technologies as they become available

There are no awards or qualifications as the pleasure of learning is the driving force. By sharing learning members help each other to develop and share programmes appropriate to their activities. Members regard themselves as learners and teachers. Paid instructors are only engaged when special expertise is necessary

U3As collaborate with each other to share expertise and facilities and offer systems of support to each other and especially to new U3As. U3As also reach out to educational and cultural bodies, and collaborate with museums, galleries and libraries in learning partnerships.

U3As collaborate with institutions undertaking research into ageing and the position of older people in society.

## Annex B.

### Sources of Information and Support

**Taunton U3A Newsletter.** Our newsletter carries the diary of group meetings together with news from the groups and notices of forthcoming events. It is published quarterly in February, May, August and November. Deadline for input to the Newsletter is notified in the previous issue.

**Taunton U3A Website.** Our website is at [www.u3asites.org.uk/taunton](http://www.u3asites.org.uk/taunton) and has useful information on Taunton U3A and listing Taunton U3A's groups.

**Third Age Matters.** This is the National newsletter which is posted to you four times a year. It contains news from around the U3As, reports on matters such as the National AGM and notices of forthcoming events such as summer schools.

**U3A National Office.** This is located at The Third Age Trust, 156 Blackfriars Road, London, SE1 8EN. Telephone 020 8466 6139. E-mail [national.office@u3a.org.uk](mailto:national.office@u3a.org.uk). A small office team responds to requests from U3A members and also helps to organise many National events.

**U3A National Web Site.** This is at [www.u3a.org.uk](http://www.u3a.org.uk) and contains a vast range of material including reference documents and information on forthcoming events. Some of the most useful information is in a members' area for which you will need to register.

**U3A On-Line Courses** here are a number of on-line courses written by U3A members here and in Australia. Access them via the U3A web site. Some subjects are free.

**Subject Advisers** Many subject areas have a volunteer subject adviser who can be consulted for advice on starting up a group and other common issues. Some advisers operate a network of U3A groups and some produce a newsletter. See U3A News or the National web site for the current list of advisers.

**Summer Schools** There are two National summer schools run by U3A members for U3A members, there is an additional one run annually by U3As in the south east. See the National web site, Sources and U3A News for announcements of these. If you are interested then BOOK EARLY because popular courses tend

to fill very quickly.

**Annex C.**

## **Accident Report Form**

Name of Injured party/address/telephone number :

Name/address/telephone number of others involved :

Date/Time of Accident : Location :

Nature of Accident/Circumstances :

Injury Details/Property Damage :

Name/address/telephone number of person causing injury/damage :

Witnessed by :  
Address :  
  
Telephone number :

Action Taken :

Was any specialised assistance required at the scene? If so give details.

Was medical advice sought afterwards? If so give details.

Name of Group Leader ..... Telephone number.....

Signed .....(injured party) Signed ..... (group leader)

Date .....

**Annex D**

**University of the Third Age Taunton**  
**Temporary Membership Form – Events/Trips**  
**Valid for the following date(s) only .....**

**Temporary Membership Fee: £5.00 PAYMENT BY CASH/CHEQUE TO U3A TAUNTON**



**In all cases please complete this form and send with payment and a Stamped Addressed Envelope for return of this form to:  
Carol Hobson, 92 Churchill Way, Taunton, TA1 3QS**

**TEMPORARY MEMBER DETAILS**

Title \_\_\_\_\_ First Name(s) \_\_\_\_\_ SURNAME \_\_\_\_\_  
 Address \_\_\_\_\_ Post Code \_\_\_\_\_  
 Landline \_\_\_\_\_ Mobile \_\_\_\_\_  
 Email (clear block capitals, please) \_\_\_\_\_  
 Friend/relative of \_\_\_\_\_ (U3A Taunton Full/Associate Member)

**EMERGENCY CONTACT**

Name \_\_\_\_\_  
 Contact Phone No(s) \_\_\_\_\_

<p>I, a <b>paid-up Member of Taunton U3A</b>, agree that the above Temporary Member:</p> <ol style="list-style-type: none"> <li>1. Has been nominated by me and is over 18 years of age.</li> <li>2. Must complete a separate Temporary Member form on every occasion, and the appropriate payment made.</li> <li>3. May attend a maximum of 2 events as a Temporary Member.</li> </ol> <p>Signed _____        Date _____        Name _____</p>	<p><b>PRIVACY STATEMENT</b></p> <p>I, the <b>Temporary Member</b>, agree that U3A Taunton may:</p> <ol style="list-style-type: none"> <li>1. Communicate with me as a TEMPORARY U3A TAUNTON Member.</li> <li>2. Share details with the relevant Convenor.</li> <li>3. Send me general information about the Third Age Trust (the National Association to which U3As are affiliated)</li> </ol> <p>Signed _____        Date _____        Name _____</p>
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**Please be advised that you can request your data not to be used for any of these purposes at any time by contacting us at the above address**

<p>OFFICE USE          TEMPORARY MEMBERSHIP AUTHORISED, AND RECEIPT FOR PAYMENT</p> <p>Signed _____ Date _____</p> <p>Carol Hobson, Membership Secretary, U3A Taunton Paid £ _____</p>	
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