

Proposal for a Treasurers' Peer Support Group

At the meeting on 24th March the establishment of peer support groups, for roles in u3s and interest group convenors, was discussed by the Committee.

At the subsequent meeting of the Executive Officers, it was agreed that a peer group for treasurers (the group) should be used as a pilot for future peer support groups to be established by the Network.

I have drawn up this proposal based on the Shared Practice Guide 12 issued by the London Region of u3as.

Link for full guide - u3asites.org.uk/files/l/london-region/docs/sharedpracticeguide012-peergroupsrev01.pdf

Format

The group will be self-managing and self-funding and responsible for deciding on aspects such of its management style and meeting administration. Initially, there will no executive committee for the group, but the agenda and meeting notes will be issued by the Network's treasurer and meetings will be held quarterly and 'virtually'.

Although the group will be self-managing, it is expected that the group would regularly report, in writing, to the South Wales Network (the Network) regarding developments, performance and any issues arising. Communications between the group and the member u3as of the Network will be directed through the Network.

The group can amend aspects of its format with approval of the Network's committee.

Purpose of the Peer Support Group

To provide a wider support for those in the role of Treasurer in South Wales based u3as.

To share and discuss best practice, with special reference to relevant documents issued by the Third Age Trust and the Charity Commissioners.

To provide informal induction for those new to the role of treasurer in a u3a.

To facilitate relevant training to treasurers and potential treasurers, where required.

Membership

Membership of the group will be open automatically to persons undertaking the role of Treasurer of the u3as in the South Wales Network and the Network's Treasurer.

Subject to request and approval by the Network Committee, membership will also be open to Treasurers of other u3as and u3a networks. This will enable the 'pool of knowledge' to be extended.

Members of the group should be able to discuss issues as freely as they need to. It is therefore essential that confidentiality is respected.