



University of the Third Age

BLACKWATER U3A

Coordinators' Guidelines
2016
(Version 2)

Blackwater U3A
Committee

Contents

1. Introduction
2. Getting started
3. Initial meeting agenda
4. Tasks to do
5. Venue options and booking arrangements
6. Types of group
7. Joint groups/visits with other U3A's
8. Non-members and members of other U3A's
9. Paid tutors
10. Finances, cash handling and expenses
11. Visits and travel options
12. Advertising your group
13. WMCC security and car parking arrangements
14. Insurance
15. Presentation equipment
16. BU3A database
17. Emergency contact lists and the ICE team
18. Risk assessments, first aid and accident forms
19. Monthly meeting set-up and refreshment rotas

Co-ordinator Guidelines

1 Introduction

This booklet is designed to support and inform Interest Group Co-ordinators and group organisers in their quest to create new interest groups and to run existing groups. The Third Age Trust's publication 'Interest Groups' dated January 2016 and the Blackwater U3A's Co-ordinator Guidelines 2010 and 2015 have provided the resource material for this booklet. If you have any questions or something isn't clear, please speak to the Group Co-ordinator.

2 Getting started

To start up a new group, first put the idea to the Committee via the Group Co-ordinator. If approved, the proposed group can be introduced to members at a monthly meeting, and a notice displayed at the meeting, in the newsletter and on the BU3A web-site.

You will need to provide a signing-up sheet, so that potential group members can leave their contact details. An informal meeting can then be organised for a get-together to discuss how the group might work. If you need to book a venue, it should be booked in the name of U3A.

3 Initial meeting agenda

Possible items for discussion at the first meeting could include:

- What do we want to do?
- Who will lead the group? Elect a Co-ordinator and deputy but, perhaps, get individual members of the group to organise specific meetings.
- Where shall we meet? This can be in a member's home or in a room or hall.
- When do we want to meet? How frequently and for how long? Where possible, try to avoid clashes with other groups' dates
- Refreshments, who will supply them?
- How much will we need to charge members to cover our costs? Always allow a bit extra to cover unforeseen expenses.

4 Tasks to do

- Create list of members' names, phone numbers and, if required, ICE details – see paragraph 17.
- If you have disabled members in the group, think about what assistance or special facilities they may need.
- Book the venue
- Set programme for first 4 or 5 months
- Book speakers (if appropriate)
- Keep a record of income and expenditure
- Inform the newsletter editor so he can include the event dates in the calendar

5 Venue options and booking arrangements

Several venues in the Maldon area have rooms to hire, including some in pubs and cafes which are free if everyone buys a coffee! West Maldon Community Centre has two rooms

available for groups of up to 24. For room hire at the Centre, contact the bookings secretary on 0300 0111995 or by email on bookings@wmcc.org.uk Once a booking has been made, inform the Treasurer who will sign the contract and will make arrangements to pay the invoices. Room hire costs will be debited to the Interest Group funds.

6 Types of Group

There are various types of groups. Some are very close knit where members will attend regularly e.g. a language course. Others are more informal and cover a variety of interests where some of the members will always turn up and others will only attend if the subject matter on the day interests them. In these loose groups it can be difficult deciding who is and who isn't a member of the group!

The groups may be 'tutor led' where an expert is required [see the section 9]. They may also be led by the co-ordinator if they have sufficient knowledge of the subject or by one of the group members. Sometimes a speaker may be booked to cover a particular item of interest.

7 Joint groups/visits with other U3As

If you find that you do not have enough people to make the group viable, it can be useful to form a joint group with another local U3A (Maldon, Limebrook or Heybridge). Contact phone numbers are given in the monthly newsletter.

8 Non-members and members of other U3A's

It has been agreed by the Committee that non-members may come to monthly or group meetings as a visitor or guest. However, this is limited to two attendances after which they are expected to join as a member. The four U3As in the Maldon area have also agreed that members of other U3As are welcome to attend their Interest Groups. However, there will be situations when the number of members has to be limited, for example, if meetings take place in a member's house. The final decision on whether to limit the size of a group rests with the Co-ordinator. If there is a waiting list, Blackwater members should be given priority over members of other U3As. Disabled members may bring a carer to an event. The carer does not have to be a U3A member.

9 Paid tutors

The ethos of U3A is that groups should be organised 'for the members by the members'. No U3A member should ever receive payment for their time. However, there are situations where it is necessary to hire a paid tutor, either for Health and Safety reasons (eg. keep fit) or because the group wants to progress beyond the knowledge level of the existing group members (for example, language groups). If you do decide to hire a tutor, it is important to check that the tutor is registered as being self-employed for Tax and National Insurance and that the tutor has Public Liability Insurance – the U3A insurance policy does not cover groups being taught by a professional tutor.

10 Finances, cash handling and expenses

- With the exception of petty cash payments, all group income and expenditure must go through the Blackwater U3A accounts. Private cheques or credit cards should not be used to make payments.
- Keep a record of income and expenditure as this information will be required by the Treasurer.
- Monies collected for events should be forwarded to the Treasurer with 'Payment Received Form B'. Please check that cheques are made payable to Blackwater U3A with the event details noted on the reverse and are signed and dated correctly. It is suggested that no more than £50 should be held in cash at a member's house.
- Use 'Payment Request Form C' to request cheques to pay for coaches, speakers, entrance fees, etc.
- Provide the Treasurer with the appropriately addressed and stamped envelope to post the cheque to the recipient.
- Use Form D to claim Co-ordinator/Group expenses for printing and postage. The Treasurer can advise on current expense rates.

11 Visits and travel options

Some of the most popular events are organised visits to historic buildings, gardens, theatres and museums. Travel to these locations may be by public transport, hired coach or car share. For groups of less than 30, car share is often the easiest and cheapest option. However, it is important to make sure that you have enough volunteer drivers and that their insurance covers them for carrying passengers who are contributing towards the cost. Most insurance policies cover drivers in this situation but only if the payment is strictly to cover costs. You will **not** be covered if the payment exceeds the costs. Blackwater U3A has a fixed table of costs, based on the distance travelled. For details, please speak to the Group Co-ordinator. If you are booking a coach for a long trip, try to get one with an on-board toilet! Don't forget our disabled members - Viking community transport mini-buses are equipped for wheelchairs. When putting out sign-up sheets for a trip, try and include as much information as possible. For example: method of travel, cost, toilet/refreshment stops and car parking arrangements.

12 Advertising your group

There are a number of channels where your group's future activities can be advertised:

Newsletter reports: To provide information about forthcoming events, coordinators are encouraged to arrange for a short report to be written for inclusion in the monthly newsletter. Reports should be sent to the newsletter editor by the date given in the previous newsletter.

Monthly Meetings: Have a group display at each monthly meeting, showing what the future plans are and have a sign-up sheet for each event, allowing all BU3A members to indicate

their interest in particular events. You can also speak during the monthly meeting to give details of any forthcoming events. Speak to the Group Co-ordinator if you would like to be allocated space for displaying sign-up sheets, or a group notice board.

Group Meetings: Display the same sign-up sheets at group meetings as used in the monthly meetings. This will assist in assessing the viability of a trip and can also double up as an attendance register and check sheet for event attendance payments.

The Blackwater U3A Website: Send a short pen-picture and a couple of photographs to the webmaster.

13 WMCC security and car parking arrangements

- When hiring a room at the WMCC, please carefully read the terms and conditions on the reverse of the booking form. A copy of these is available from the Group Co-ordinator.
- Complete the hiring agreement and send it to our Treasurer for signature.
- If you are the only occupants of the Centre, please secure the front door. When leaving, check that no one is still in the building (including the toilets!) and lock the door behind you. If you aren't sure of procedures, check with the Group Co-ordinator.
- Complete the first aid books at the Centre to record all incidents and accidents. They can be found in the kitchen drawer or in the first aid cupboard by the main front doors.
- If arranging coach trips it is often possible for members to park towards the far end of the car park. Please contact the booking officer well in advance to establish if the car park will have spare capacity on the day of the trip.

NB. It may not be possible to use the car park at week-ends or in the evening as the entrance gate may be locked. Check with the MDC Park Ranger (01621 852475)

14 Insurance

The Third Age Trust holds comprehensive insurance which provides cover for all U3A members against a wide variety of risks. The most important of these are:

- Public liability cover for U3A event organisers, should they be found to be legally liable for the accidental injury or death of any person. Public liability insurance does **not** cover pure accidents where no legal liability has been established.
- Accidental loss or damage to property **not** belonging to you
- Loss or theft of U3A cash in transit or held in a member's house
- Loss, theft or damage of U3A equipment
- Damage to a member's house or property when being used for a U3A event
- Legal liability of a Trustee for losses incurred when carrying out the duties of a U3A charity Trustee

The Third Age Trust also provides 'Tour Operator Liability' cover for members organising short study trips involving an over-night stay. Longer trips or holidays should be organised through a bonded travel agent. For more details please contact the Secretar

15 Presentation equipment

Blackwater U3A owns a range of display equipment which is available for any member to borrow. The main items are:

- Two laptop computers, both with Office 2010
- Amplifier and speakers for use with above computers
- Small projector for presentations to groups of up to 30 people.
- High-powered projector for use in large halls
- Portable projector stand
- Portable projector screen (x2)
- Camera for use with a projector to display documents or original photographs onto a screen.

If you wish to book any item, please contact the Group Co-ordinator or the Secretary.

16 BU3A database

The BU3A membership database holds comprehensive information on all members and may be used to compile sign-up sheets, attendance sheets and emergency contact lists (or ICE lists). It can also be used to keep a record of member payments. For access to the database and for training on how to use it, please contact the Database Manager. For information on Data Protection, please see our Data Protection Statement, which may be downloaded from the BU3A website.

17 Emergency contact lists and the ICE team

Whether we like it or not, we are all getting older and, unfortunately, this increases the risk of us having an accident or a medical emergency. If you are organising an event it's important that you know who to contact should you be faced with such an emergency. For this reason U3A National Office advise that, before going on a trip, the Co-ordinator should prepare a list (an ICE list) of everyone going on the trip, together with a contact phone number of a friend or relative **not** going on the trip and for a copy of the list to be left with someone 'back at base'. If, for example, the member has to be taken to hospital, the friend or relative can then be advised.

ICE Lists should be prepared for all organised trips travelling **outside** the Maldon area. One copy should be retained by the person leading the trip and a copy should be emailed to the Blackwater ICE team (Membership Secretary, Group Co-ordinator and Database Manager). If the list is created using the Blackwater U3A membership database then it is only necessary to advise the ICE team of the name and date of the event as the list can be accessed on line. ICE lists are **not** required for local events but if your group undertakes potentially hazardous activities, eg. cycling, walking or birdwatching, then it is recommended that you create a list for your own use.

18 Risk assessments, first aid and accident forms

When organising an event, be it a trip or a social event involving some levels of movement, consider the risks to the members likely to be attending. Can they, say, climb a spiral stair

case, walk on slippery paths, walk a few miles. Consider evacuation points in case of injury. For further guidance, please read the U3A *Risk Assessment* forms. In an emergency situation, it is not expected that any of us will do anything other than take reasonable, safe, common-sense actions. However, if your group takes part in sports or outside activities, it is recommended that you take a first aid kit and that at least one member of the group has first aid knowledge. Should an accident or emergency incident occur during an event or trip, then the Co-ordinator or person leading the trip should complete an Accident Form and send it the Group Co-ordinator as soon as possible after the event. Forms may be obtained from the Group Co-ordinator or downloaded from the BU3A website.

19 Monthly meeting set-up and refreshment rotas

The main Blackwater U3A monthly meeting depends on teams of volunteers to help with the setting up and putting away of tables and chairs, refreshments and 'meeting and greeting' new members. To make this fairer for everyone, a rota has been set up and each month two groups will be asked to provide volunteers to cover each activity. In practice, this means each group will only need to cover each activity once every nine months. Those groups responsible for the next three month's meetings will be shown in the newsletter.