



# Islington

## **ADVICE NOTES FOR GROUP COORDINATORS** (Update August 2018)

These notes have been prepared as a guide to assist group coordinators in the running of their groups. They take into account guidelines from the U3A National Office (The Third Age Trust). In some cases guidelines have been adapted in practice to suit the particular requirements of Islington U3A ("iU3A").

### **1. Groups and Coordinators**

iU3A's groups express the essential nature of the U3A movement as a learning community that reaches out into the wider world and provides an environment that is inclusive, welcoming and receptive to new ideas.

Group coordinators are central to our success as a local U3A and are greatly valued by their group members. In Islington all our coordinators are volunteers who do not receive any payment for their role, thus contributing to the unique feature of our organisation: that it is run by and for its members.

### **2. Support for Coordinators**

Sue Welsford, the Groups Coordinator, is responsible for liaising with group coordinators and providing support when required. Please contact Sue Welsford, [groups@islingtonu3a.org](mailto:groups@islingtonu3a.org), if you require any assistance or have any suggestions or issues regarding group matters.

### **3. Access to the National Website**

There is a substantial amount of useful information available on The Third Age Trust's website at [u3a.org.uk](http://u3a.org.uk). This information is accessed via the Members' Area Homepage, for which you need a logon. To set it up, click on Create Account at the top right of the Home Page and register as you would with any other internet site. You don't need your iU3A membership number to do so.

See Appendix for a summary of useful information available on the National Website.

## **4. Information about our activities**

It is vital that we inform members and potential members about our activities and that we provide clear, well presented and up to date information on our website, in the *iU3A Newsletter* and the *Bulletin* and through Twitter.

The *iU3A Newsletter* comes out two or three times a year. It generally provides a 'look back' on activities held. It has a section for reports on group activities which is very popular with members, so the editor welcomes contributions from group coordinators or group members about the group's activities. The deadline for each issue is notified to group coordinators.

The twice monthly *Bulletin* contains information about new groups, about groups that would welcome further members and about special group activities that are open to members more generally, such as a talk by an outside speaker. The *Bulletin* generally provides a 'look forward' on our up and coming activities. The *Bulletin* editor can be contacted by email at [Bulletin.editor@islingtonu3a.org](mailto:Bulletin.editor@islingtonu3a.org).

### **4.1 Group Webpages**

Each group has its own webpage to provide information about the group's activities including details of what it does and when it meets and promotional material such as photographs, future topics, as well as details of some of its past activities. The page also provides a means for members and others to contact you directly without your private email address being put in the public domain.

Derek Harwood ([website.manager@islingtonu3a.org](mailto:website.manager@islingtonu3a.org)), as the website manager, creates your group's webpage. He puts your material on the page and can advise you on how best to present it. You are responsible for ensuring the page reflects the group and its activities attractively and effectively and that it is kept up to date.

### **4.2 Beacon**

Each group coordinator should post information of the group's schedule and events on the relevant Beacon page. See Section 6.1 for more information on Beacon.

### **4.3 Photographs**

Care needs to be taken over the use of photographs, whether on the website, at monthly meetings, in the Newsletter, at the Open Day or otherwise particularly with regard to copyright and data protection.

#### *Copyright*

We have been advised by The Third Age Trust that some U3As have been required to pay permission fees by the copyright holders of photographs that they have used on their websites.

We can minimise this risk for iU3A by as far as possible using photographs taken by members, or other people we know, and given to us for use on the website.

Where we don't have a suitable photograph from such a source, there are some cases where we can use one found on the Internet. Some pictures are not subject to copyright because it has expired or because it's not been asserted, such as NASA's pictures from space. Others are covered by 'Creative Commons' licences and can be used free of charge provided the copyright holder is acknowledged. Also, as book cover pictures and media stills for theatres are publicity materials, we are willing to use them too.

So, when you send photos to the website manager please tell him where they have come from so we know what acknowledgments are necessary.

### *Photos of iU3A members*

Whilst using photographs of members may be friendly, welcoming and good publicity, the photographs are subject to the rules relating to data protection (see section 7 below). So before taking any photographs of members that will be put on the website or used for any publicity or promotional purpose, you must ask for permission and ensure that any members who do not wish to be included in the photograph step out of the frame.

## **5. Insurance**

Insurance policies maintained by The Third Age Trust cover group coordinators and members for a number of risks. These include:

- Public and products liability
- Professional indemnity
- Home contents
- Equipment – all risks
- Legal Defence

Details, together with answers to some frequently asked questions, can be found on The Third Age Trust website, <http://www.u3a.org.uk> (Members' Area Homepage > Advice > Insurance and Safety)

## **6. Managing group membership:**

### **6.1 Beacon Membership System**

iU3A uses a database, which has been developed especially for U3As by The Third Age Trust, for managing many of its activities. You should use this for checking whether the members of your group have up-to-date iU3A membership, adding new members to your group, removing those members from your group whose iU3A membership has lapsed,

keeping waiting lists, sending out group emails and uploading details of your future activities on to the calendar. If you need any assistance with using Beacon do contact one of the following:

[groups@islingtonu3a.org](mailto:groups@islingtonu3a.org)  
[iu3amembers@outlook.com](mailto:iu3amembers@outlook.com)  
[website.manager@islingtonu3a.org](mailto:website.manager@islingtonu3a.org)

A Beacon guidance tutorial can be found at a link under Training for Group Coordinators [HERE](#).

### **6.2 Recording attendance**

You need to keep a record of who attends each meeting. This is a requirement of the insurance policy that The Third Age Trust holds which covers all local U3As.

Provided there are no outstanding potential insurance issues arising out of any of the meetings of the relevant Group, a Group's attendance records for any membership year (1 October to the following 30 September) should be destroyed following the end of that membership year. When destroyed, all paper and electronic attendance records should be shredded or otherwise destroyed in a manner that would make it impossible for the records to be reconstituted.

### **6.3 Attendance by non-members**

If a non-member wishes to try out a group before deciding whether to join iU3A this is allowed by our insurance cover. Our policy in iU3A is that only one such visit is permitted after which the person must become an iU3A member if they wish to continue to attend the group.

### **6.4 Options for dealing with full groups**

There are three main options for dealing with a group that is becoming too full:

- Finding a larger venue
- Splitting into two groups
- Developing a waiting list

Which of these options is chosen will depend on the nature of the group and the views of you and your members. For generalist groups, for example book groups and various discussion groups, it is easy to form further groups when a group becomes full. For those that require an expert leader, such as language conversation groups, it will be necessary to find an appropriate coordinator.

If your group is approaching capacity, please consult Sue Welsford about the preferred way forward and, if a waiting list is going to be kept, keep her updated about expressions of interest, so that a new group can be formed whenever possible.

### **6.5 Lack of response to emails**

You may sometimes find that you don't get any response from some of the members who signed up for your group. If a further email to these members asking them whether they wish to remain in the group does not receive a response you can remove their name from your group's membership list in Beacon

In addition, in some groups members who are part of the group may not respond to emails that are sent round or fail to inform the coordinator when they are unable to attend. This is very impolite and it's disheartening too. We need to think of ways of conveying to the membership that to sustain iU3A's success we all need to play our part as friendly responsive members.

### **6.6 Members who cease to attend**

Over time you may well find that a regular attender at the group stops coming, possibly as a consequence of a significant event in their life. It would be appropriate for you to contact a member who suddenly ceases to come to find out what has happened to them. Islington Age UK, which has a number of services to assist people at difficult periods in their lives, may be able to help them.

### **6.7 Communicating with members who don't have email**

We have chosen to communicate with our members electronically but we have a few members who do not have email (this is clearly indicated against their names on Beacon). Having a group member who does not have email can be problematic for the coordinator especially if there is a significant amount of information to share. As group coordinators are all volunteers it is unreasonable to expect you to copy and post lots of material to an individual member. Therefore, we leave it to you to decide the method and extent of the communications that group members without email receive. Members without email might sometimes be able to nominate a "buddy" to receive emails on their behalf.

## **7. Privacy and Data protection**

Members give us their contact details so that they can be used solely for iU3A purposes and we have an obligation to ensure that the details are kept confidential. Initial email circulation of information to group members should use the blind copy facility (bcc) so that email addresses are not revealed. A great advantage of using Beacon to send out your group emails is that they are automatically sent out bcc, thus avoiding an accidental slip-up if any other method is adopted. Once the group is operational, members may agree to share their address details, but this agreement must be documented in either hard copy or electronic form and you will need to retain it securely.

So that your own privacy is protected, your group webpage does not show your private email address. Instead, there is an iU3A mailbox, which forwards mail to you. Similarly, information that you prepare to go on your group page should not include either your own email address or that of another group member.

The key principles of data protection (updated in May 2018) can be found on The Third Age Trust website, <http://www.u3a.org.uk> (Members' Area Homepage > Advice > Data Protection).

In connection with the introduction of the General Data Protection Regulation ("GDPR") in May 2018 iU3A has adopted a Privacy Policy ([HERE](#)) and an internal Data Protection Policy is available on request. In addition there are Data Protection Guidelines for group coordinators ([HERE](#)). It is most important that you familiarise yourself with all of these.

If you have any questions or concerns relating to GDPR or data protection generally, do contact:

[website.manager@islingtonu3a.org](mailto:website.manager@islingtonu3a.org).

## **8. Venues for Group meetings**

Most groups that require a meeting place meet in a member's home. For groups that are larger or for which there is no member's home available, it may be necessary to consider a different type of venue. Various possible free venues have been identified and we are continuing to seek additional free venues. In some cases it may be necessary to hire a venue. However, meeting places in Islington are generally quite expensive and we have limited funds. So, where a hired venue may be required, please contact our Treasurer, Robert Welsford, [iu3atreasurer@gmail.com](mailto:iu3atreasurer@gmail.com), who needs to approve the expenditure before any booking is made. For details of possible venues, please consult Sue Welsford, [groups@islingtonu3a.org](mailto:groups@islingtonu3a.org).

## **9. Contributions for refreshments at meetings**

The Executive Committee has agreed a policy that there should be a standard charge of 50p per person to cover refreshments at meetings in members' homes, which should be paid to the person hosting the meeting.

Where meetings are held in hired premises, the charge may be increased to £1 at the discretion of the coordinator and any surplus should then be paid over to our Treasurer and will be used to offset the cost of the premises. In venues such as pubs or restaurants members should pay directly for refreshments they order unless the coordinator makes other arrangements.

## **10. Payment for group activities**

Groups are generally self-financing and group members pay for costs such as theatre tickets or entry fees for visits themselves. They may do so individually or through the group coordinator or iU3A.

Where payments are made through the group coordinator or iU3A there are two overriding principles that need to be observed. First, such money should not be paid into the group coordinator's own bank account but, if needing to be banked, should be paid into the iU3A bank account. Secondly, iU3A cannot itself pay for any tickets until it has received the necessary funds from members. If a group needs to pay for tickets or entry fees in advance of an event, the group coordinator should discuss the payment arrangements with our Treasurer, Robert Welsford, [iu3atreasurer@gmail.com](mailto:iu3atreasurer@gmail.com).

Sometimes a group may express a wish to employ an instructor or tutor. This would present iU3A with a range of risks concerning professional liability insurance cover and the tax and employment status of the individual concerned. Therefore, such action can only be considered in the most exceptional circumstances and will require prior approval from the Executive Committee.

## **11. Terms**

Some U3As split the year into three terms, similar to those of a school or university, but it is not a requirement for us to do so. iU3A hasn't adopted a term structure and groups are free to decide whether they do so or not. We have monthly lectures every month of the year except for August and December and it is up to each group whether they want to meet in those months.

## **12. Deputy coordinators**

Some coordinators might like to have a deputy coordinator to assist with running their group and to step in for them if that is necessary. Also, from time to time issues may arise that you would like to discuss with somebody else before deciding the best thing to do. A deputy coordinator might be helpful here, and Sue Welsford is also available to help resolve any concerns.

## **13. Complaints Procedure**

iU3A's procedure for dealing with complaints has been adapted from National U3A guidelines and is on our website [HERE](#).

## **14. Timetabling**

Although some overlaps are inevitable, coordinators should try to minimise as far as possible clashes with other group meetings. You will find a timetable of the regular group meetings through the link on

the "Groups" web page and in the calendar in Beacon. Most importantly, however, no meeting should be scheduled to clash with any of the Monthly Meetings (which are held on the morning of the fourth Thursday of each month, except August and December).

## **Appendices**

### **Useful information available on the Third Age Trust website** [u3a.org.uk](http://www.u3a.org.uk)

#### **1 The Role of the Coordinator**

Guidelines on the role and activities of coordinators are available on The Third Age Trust website, <http://www.u3a.org.uk> (Members' Area Homepage > Advice > Supporting Your Members > Interest Groups).

The guidelines include suggestions regarding:

- Starting up interest groups
- Types of study
- The group coordinator's role
- Running a group discussion
- Encouraging a culture of planning

#### **2 Advice for Coordinators**

Further advice for group coordinators is available on The Third Age Trust website, <http://www.u3a.org.uk> (Members' Area Homepage > Advice > Supporting Your Members > Group Convenors) and includes:

- Accommodation
- Member administration
- Dealing with problems
- Financial aspects
- Organisation of Groups

#### **3 Resources from The Third Age Trust**

The Resources link on The Third Age Trust website, <http://www.u3a.org.uk> (Members' Area Homepage > Resources) will take you to a summary of material available from the Resource Centre. This includes DVDs and CDs on numerous subjects that can be borrowed.

#### **4 Subject Advice**

There is also a link from the Members' Area to Subject Advice, <http://www.u3a.org.uk> (Members' Area Homepage > Resources > Subject Advice). This contains a list of a large number of interest group subjects for which advisors can be contacted for assistance. Leaflets are available for some of these subjects.