Group Coordinators/Convenors Guidance
Rev 04

Previous revisions: 2017; 2018; 2021 (last edits by Judith Altshul & Derek Harwood, December 2021).

You can find the basic Role Description on the Contacts page of our website or here: Group Coordinator's Role Descriptions This reflects the basic requirements of:

- Taking attendance records
- Updating details on Beacon and the Website
- Developing a successor

2. When, Where, How to Set Up a Group

2.1. How to Set up a New Group

While the New Groups Coordinator will establish new groups the Groups Coordinator needs to support as the baton will be passed to take the fledging group forward. Guidance on this process can be found here:

How to set up a new group

2.2. Short Term Groups

Most of groups, once set up run for some time. However now we also have short term groups. Specific guidance on setting these up can be found here:

How to set up a short term group

3. Venues for Group Meetings

GCs are responsible for finding their own venue for group meetings. Many will meet in a members house but some will use public venues. iU3A does keep a list of public venues that may be helpful if you are looking for a suitable place:

Islington Venues

Funding support for hiring a public space may be available and should be applied for to the Executive Committee (EC).

The Covid 19 pandemic is affecting the venues, and the choice of venues, used for group meetings. For the foreseeable future all new groups should discuss meeting arrangements with a member of the Groups Team. Many will meet online or hold a combination of in-person and virtual meetings or combined versions such as hybrid or blended meetings.

Hybrid Meetings Guidance

4. Timetabling

As a GC you are welcome to choose when you hold your meetings. However we do ask that you try to minimise as far as possible clashes with other group meetings. This allows members to attend as many groups as they can and allows us to offer Zoom facilities as efficiently as possible. You will find a timetable of the regular group meetings through the link on the "Groups" listing web page and in the calendar in Beacon or here:

[Timetable](#)

Most importantly, however, no meeting should be scheduled to clash with any of the regular Bi-Monthly Meetings of all members (which are currently held on the morning of the second and fourth Thursday of each month.

5.   Payment for Group Activities

We have traditionally levied a standard charge of 50p per person to cover refreshments at meetings in members' homes. Each GC can decide to request this payment or not.

Groups are generally self-financing and group members pay for costs such as materials, theatre tickets or entry fees for visits themselves. They may do so individually or through the Group Coordinator or iU3A EC. It is important that where payments are made:

- they should not be paid into the GC's own bank account but should be paid into the iU3A bank account
- if a group needs to pay for tickets or entry fees in advance of an event, the GC should discuss the payment arrangements with the Treasurer, iu3atreasurer@gmail.com

GC may submit requests to the EC for funding for some special events, venue bookings, permanent equipment. Please consult the Groups Coordinator in the first instance.

6.   Beacon

Beacon is a management system which has been developed especially for U3As by The Third Age Trust for managing many of its activities and as a GC you have a vital role in managing our overall membership! We ask that each GC becomes familiar fairly quickly with Beacon.

Access to our Beacon data is secure. Our Beacon system is accessible to only members of iU3A from the iU3A website ('Members' page) and then with a secure log in method. You will receive training on how to access Beacon and use it to keep in touch with your members.

Please use Beacon to:

- check from time to time whether your members have up-to-date iU3A membership (particularly relevant after Renewals time – October)
- add new members to your group
- remove those members from your group whose iU3A membership has lapsed or they have left
- keep waiting lists
- send out group emails (as they then are automatically blind copied to protect members personal details)
- post information of the group's activities and schedule of meetings
- upload 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

iu3amembers@outlook.com

website.manager@islingtonu3a.org

A Beacon guidance tutorial can also be found here: Beacon Tutorial

7.   Insurance

To protect you from claims for damage we have insurance policies that are maintained by the Third Age Trust and which cover GCs and members for a number of risks. These include:

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

Details about these, together with answers to some frequently asked questions, can be found on The Third Age Trust website: Insurance FAQs

8.   Risk Assessment

Generally GCs should consider risk in all their group meetings. The considerations will be different if they are outdoor physical gatherings or indoor meetings (either at the GCs house or in a public venue).

Most public venues will have carried out a risk assessment to comply with current health and safety regulations. If you are holding meetings in private homes, you will need to carry out a basic check that the room to be used is suitable for meetings and members will be safe and secure. A number of suggested formats for general risk assessment can be found on the national website here: Risk Assessment Forms

You need to do additional checks under Covid restrictions.

9.   Accident

It is very unlikely that you will experience an accident in your group, but in case you do, please note that you should fill in an Accident Report Form as soon as possible and submit it to the EC.

(Attach Accident Report Form)

10. Attendance Record

When your group is meeting in person (i.e. not on the internet) it is important that you record who attends each meeting. This is a requirement of the insurance policy that the Third Age Trust holds which covers all local U3As. It is also a requirement that these records are destroyed at the end of each U3A year (30th September). Most GCs find it very helpful to have such a record.

(Attach Attendance Record sample)

11. Non-members Attending Group Meetings

There may be times when you are happy for a non-member of iU3A to join a meeting before you and they decide whether this is the right group for them and if they want to join iU3A. This is allowed by our insurance cover, however 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.

12. Group Size

If you find your group is becoming too full, there are three main options available:

- finding a larger venue
- splitting into two groups
- developing a waiting list

Which of these you choose 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 the Groups Coordinator about the preferred way forward and, if a waiting list is going to be kept, keep them updated about expressions of interest, so that a new group can be formed when possible and how to set up a short term group. Beacon assists in enabling a waiting list.

13. Dealing with Issues with your Group Members

13.1. Attendance

Sometimes a member may seem to drop out of your group without notice. For example, they may not respond to your emails. If they also do not attend meetings, then we suggest you send them a further email asking if they wish to remain a member of the group. If they do not reply you may remove them from the group membership list on Beacon.

If they have been a regular attender, you may also wish to ask other members and the iU3A EC whether they have any other news of them. If appropriate, Islington Age UK, has a number of services to assist people at difficult periods in their lives, and may be able to help them..

13.2. Communication

iU3A has 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). This can involve the GC in considerable extra work, especially if there is a significant amount of information to share, however we do want iU3a to be as inclusive as possible. So we leave it to you to decide how to handle this, for example members without email might sometimes be able to nominate a "buddy" to receive emails on their behalf.

13.3. Behaviour

Very rarely a group may have a problem with the behaviour of an individual group member. If you are becoming concerned about a member, please contact the appropriate member of the Groups Team in the first instance. Further guidance is given on this in the 'Policy and Procedure on Problems and Grievances' which can be found on our website here: Grievance Procedure

13.4. Diversity and Inclusion

We aim to be an inclusive organisation. Our policy documentation is on our website and can be viewed here: <u>Equal Opportunity Policy</u>

Discrimination: <mark>Attach documentation from website</mark>

14.   Being Part of the Organisation

While a lot of your energy will be focused on your own group, we depend on groups feeling (and being) an active part of iU3A. Here are some of the ways we do this:

14.1. Buddy System

Many u3a local groups have a buddy system. iU3A had a form of this in place over the Covid period to provide a postcode (local) member to support other members that have requested welfare support. The iU3A EC welcomes any suggestions/offers from members for setting up a longer term system in our u3a.

14.2. Small Group Meetings

Occasional informal meetings of new members, GCs, etc. with members of the EC are held, usually in the form of coffee mornings or afternoon teas, or Zoom meetings. Invites are sometimes in-person and sometimes an open invitation is featured in the Bulletin to which members can sign up. Please do take part in these.

14.3. Meetings of all Group Coordinators/ Convenors

Either in person or online, the Groups Coordinator will host a meeting of all GCs 2-3 times a year. This allows everyone to share views on good practice, exchange news about their groups, and consider ways forward in response to particular events.
There is normally an annual Group Coordinators lunch to which all GC are invited.

14.4. Informing Others About Our Activities.

We need to all help publicise the existence and benefits of iU3A. For non members our shop window is our website. All enquiries should be given the website address so they can explore further and this includes Contact details or methods of joining up.

For current members to discover more there are five ways to do this:
- on our website
- in the iU3A Bulletin (twice a month)
- the Newsletter (quarterly)
- through one of the iU3A social media accounts (FaceBook, Twitter, Instagram)

Each group also has its own webpage to provide information about the group's activities. This includes details of what it does, how and when it meets, future topics, some of its past activities, and occasional photographs. 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), 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.

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 (Wil Ransome) can be contacted by email at Bulletin.editor@islingtonu3a.org. Please consider providing contributions to our Bulletins.

The iU3A Newsletter comes out three or four 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 GCs or group members about the group's activities. The editor of the newsletter will notify you of the deadlines for the upcoming issue. If you would like to discuss an item before submitting it please contact Anne Weyman (comms@islingtonu3a.org)

To post items on our Twitter account your contact person is Cylia Ballantyne and for Facebook you should contact Jo-Ann Kennedy (go through Anne Wyeman, address above). For any images to go up on our Instagram account contact Derek Harwood (website.manager@islingtonu3a.org).

We hope that many groups will want to post photographs on their website and/or on Twitter/Facebook. However, we do need to be careful about copyright and data protection, as some u3as have been required to pay permission fees by the copyright holders of photographs that they have used on their websites.

So where possible please use photographs taken by members, or other people you know, given to us for use on the website. Although even here please do remember to ask for their permission and ensure that any members who do not wish to be included in the photograph step out of the frame.
If you particularly want to use a photo from the internet instead, please check Appendix A (below) or here: Copyright Guidance

15. Privacy

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 where members want this. At the start of a group, initial email circulation of information to group members should use the blind copy facility (bcc) so that email addresses are not revealed. An early topic of discussion can be whether group members want to continue to use the bcc facility or whether they prefer to share email addresses and use those or perhaps set up a chat group, such as WhatsApp. If there is agreement to share email addresses then this allows for ongoing open email conversation between members whereas the bcc arrangement does not. Smaller groups tend to have this personal agreement whereas the larger groups tend to use the bcc facility of Beacon.

So that your own privacy is protected, your group webpage does not show your private email address. Instead, there is an iU3A group 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. iU3A has a Privacy Policy which is on our website or can be viewed here: [iU3A Privacy Policy](#)

You can find further details about the principles of data protection in Appendix B.

16. Safeguarding

We must provide a safe and protected environment for all our members and our activities. iU3A has a dedicated policy on this matter which can be viewed on our website or here: <mark>Safeguarding Policy.</mark>

APPENDICES

Appendix A: Using photos from the internet
it's important to check whether:
- This picture is not subject to copyright because copyright has expired or because it's not been asserted (e.g. NASA's pictures from space)
- It is covered by a 'Creative Commons' licence and can therefore be used free of charge provided the copyright holder is acknowledged (do then remember to acknowledge it!)
- It is part of publicity materials (e.g. book cover pictures and media stills for theatres) where it is likely that use of these will be welcomed

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

Appendix B: The key principles of data protection and of GDPR
These 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 familiarize 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.

Appendix C: London Region of U3As
London Region of U3As (LRU3A) is a network of the London based u3as (approx 43 u3as). They offer joint events across the region including a Summer School. They also run 'Peer Support Groups' including one for Group Coordinators. Their website carries further information: LRU3A

Appendix D: Useful information available on the Third Age Trust website
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. 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.

1 The Role of the Convenor
Guidelines on the role and activities of Convenors 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 Convenors
Further advice for GCs 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 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.
There are national Subject Advisors who can assist you on your topic or general matters for running an Interest Group. More information is on the national website here: Subject Advice.