

# GROUP CO-ORDINATORS HANDBOOK

## Introduction

Thank you for being a Group Co-ordinator! This handbook is to guide you through what to do and how to do it. Waterlooville u3a has been going since 2006 and therefore we have lots of experience with running groups, so help is always at hand by emailing the Group Liaison and Support ([groups@waterloovilleu3a.org.uk](mailto:groups@waterloovilleu3a.org.uk)) Further copies of this document can be found on our website - [www.waterloovilleu3a.org.uk](http://www.waterloovilleu3a.org.uk)

## Your Role

The role of Group Co-ordinator will vary from group to group but essentially you will be responsible for the content, duration, and administration of all meetings. The GC is the person that acts as the hub for communicating with the respective group members, either by email, or by phone for members who are not on email.

You are also the person that Group Liaison will contact for anything that is group related including vacancies and waiting lists. For example, if someone is interested in joining your group you will be sent an email from Group Liaison with the person's contact details so you can contact them and tell them about your group, and where and when your next meeting is.

## Keeping a Register

You should keep a register of attendance at each group session and on request to send them to GL for digital copying and retention. This will ensure the information is readily available and avoids any issues that may arise from a disorganised GC, an unavailable GC (e.g., serious illness, death) and changes in GC personnel. A simple template register can be provided from Group Liaison if required. This is for several reasons :

- (1) Financial – to keep record of who has paid etc.
- (2) You may be asked to provide attendance (non-financial) records on a quarterly basis.
- (3) It will help you to spot if a member has not been attending on a regular basis and if your group is full, there may be someone on the waiting list that is keen to join.
- (4) For groups who collect subscriptions from group members, the register is also a convenient place to record payments.
- (5) Insurance purposes – if a claim is to be made, the insurance company will need to know who was present.
- (6) If there is an accident or incident that results in a claim being made, we need to know who was there at the time.
- (7) It may be needed for Fire Regulations if you are using a venue.

## **Deputies and Helpers**

It is helpful to have a deputy, or someone who can stand in on your absence. They can help and assist you with running your group, and/or they could look after your group's finances. Encourage your group members to take an active part in the planning or organisation of activities – don't try to do everything yourself.

## **Membership renewals**

During the membership renewal period, usually April to 1st June, it is helpful if you remind your members about paying their subs.

When the due date has passed (1st July) members who have not paid their subs will be listed in red on your group list on Beacon. If anyone has still not renewed their membership by the end of July their membership will automatically lapse and they will no longer be entitled to belong to any group or attend any u3a meetings or activities; they will also no longer be covered by u3a insurance.

You may be asked to remind these members of this and ask them to pay. This does not happen very often but your help in this is very much appreciated.

## **Emailing Group Members**

As a Group Co-ordinator, your preferred method of keeping in contact with your members tends to be via email. For example, you may decide to email everyone a few days before your next meeting reminding members of where and when it is. Of course, not everyone has email in which case telephone contact would be the accepted alternative.

We recommend that you use the secure Beacon system for group emails which is fully compliant with GDPR regulations. There is no need for you to manually maintain your own mailing list with members' details and all messages are automatically sent using the "bcc" method which keeps email addresses private. Beacon training is readily available, does not take very long and is thoroughly recommended to make life easier for you.

If you do maintain a group email contact list on your own computing device, you must ensure that the information is kept up to date and is only accessible by you. When a member leaves your group, you must delete any contact information about them from your device.

## **Meeting at Members' home**

If your group is small enough, then having meetings at a member's home can be a comfortable and convenient location. It has the advantage that no cost is involved, although you may decide to share the cost of materials needed at each group meeting and perhaps some light refreshments, e.g. tea/coffee/biscuits etc.

## **Meeting at a Venue**

A list of venues available around the area can be found on Beacon under "Groups", then "Venues" or on our website in the Members' Area.

If you hire a venue, then for Insurance purposes the bookings must be made under the name "Waterlooville u3a" in addition to your group name. Ask the venue to send invoices to the Groups Treasurer for payment. Some venues do not charge anything – instead they may ask that members buy tea/coffee from them.

All groups are self-financing, so any cost of room hire is paid for by the members of your group. It is usual to collect money from each member in advance of your group meetings to ensure you have sufficient funds to cover the venue and any other overheads etc. These funds would typically be passed to the Groups Treasurer to hold. Some can be held back as a kitty to pay for light refreshments. Full details can be found in the document “Financial Matters for Group Coordinators”.

The venue may give you a form that needs to be signed (they may call it Terms & Conditions). This must be signed by a u3a trustee (i.e., Business Secretary) to be covered by u3a insurance.

Be aware of any notice period required by the venue should you need to cancel a meeting. It is your responsibility to tell the venue if a reservation is not required in good time – and to advise the Groups Treasurer to avoid an inappropriate invoice being received.

Some venues are unmanned and will give you a key. Please let Group Liaison know if this is the case.

### **Meeting at an Outside Venue or Trip**

Please take a register of everyone that is at the start of your walk/outing/tour so you can check they are also there at the end! Before the event, please also give everyone an “on the day” contact mobile phone number - either yours or whoever may oversee the group on the day - so if anyone is late getting to the starting point, or gets lost during the visit, they can phone you. Please note that the u3a is not responsible for a taxi fare back home should a member fall ill and miss the bus/coach back.

### **Taster Sessions**

Group Liaison will contact you with details of anyone wishing to attend a taster session. u3a members may come to your next meeting (or two) to see if they like it first. If they do, and then wish to join your group, Group Liaison will need to be advised so they can be removed from the waiting list.

Non-members are also able to attend taster sessions if agreed with Group Liaison and the respective Group Co-ordinator, however before they can join the group after that, they must first apply for u3a membership.

### **Waiting Lists**

Waiting lists for groups that are full are held by Group Liaison. When a place in your group becomes available ask Group Liaison to send you the details of the person at the top of the list, which is kept in strict date order. Please do not keep your own waiting list or accept new members yourself as this creates confusion and potential difficulties both with the issue of insurance cover and of members jumping the queue.

### **Finance**

All financial matters are covered in a separate document “Financial Matters for Group Coordinators”.

## **Website**

There is a wealth of information for Group Co-ordinators in the Members' Area of our website.

Every group has its own web page on our website that when and where your group meets. It can also have a paragraph, written by yourself, saying what your group does. If your group has a schedule for what is planned, then it would be helpful to have that there too. Write-ups and photos are also an excellent way to show what your group has done.

To see your own page, go to the Waterlooville u3a website, click on Groups, then click your own group name and the page will be displayed. Although you can't update the page yourself, just email the Webmaster and they will do it.

## **Data Protection**

As a Group Co-ordinator, you have access to your group members' names, home addresses, landline and mobile telephone numbers and email address. Everyone is bound by the provisions of the General Data Protection Act and you need to ensure that you do not disclose anyone's personal information without their prior permission. If you have any printed material with their information on, please ensure it is kept securely somewhere that is not accessible to anyone else and that it is shredded before it is disposed of.

If anyone takes photos for inclusion on the group's web page, please check first that everyone is happy to be included.

## **Beacon**

The u3a Beacon system is used by Waterlooville u3a to store and manage our membership, groups, and finance information; it is designed with security of personal information in mind, complies fully with GDPR regulations and is supported by the Third Age Trust.

We recommend all GCs make use of Beacon as it is simple to use, and training is provided – usually around a couple of hours. It removes the need for you to create or maintain your own group mailing list, member contact information is up to date and changes to your group membership are managed by Group Liaison.

If your group regularly hires a venue, a speaker or instructor, your group finances will be recorded in Beacon where you can see briefly all the ins and outs and current balance.

## **Equipment**

We have several items in storage that can be borrowed by all groups. Just email [equipment@waterloovilleu3a.org.uk](mailto:equipment@waterloovilleu3a.org.uk) for more information: -

- Laptops
- Projector
- Projector screens (4ft and 7ft)
- Display/White Boards
- Video Camera
- DVD/CD player
- PA Systems
- Portable Sound System

### **Accidents and Incidents**

It is essential for u3a insurance purposes that Group Coordinators ensure that all members of their group hold current membership of Waterloo u3a.

A Group Coordinator must complete an accident report form in the event of any accident to a member, however minor the incident, during a group activity. A blank copy of this form is on our website in the Members Area under 'Documents'.

The accident report form must be passed to Group Support, the Business Secretary, or any Committee member within 48 hours of the incident.

### **Personal Vehicle Use**

If you car share, it is perfectly acceptable to give some 'petrol money' to the driver. The amount currently recommended by HMRC is 45p per mile, shared by everyone in the car, including the driver (as they are going anyway). It does not affect "Social, Domestic and Pleasure" insurance cover as long as it is kept informal.

### **Third Age Trust resources**

There is a wealth of information and advice available from the national u3a :

<https://www.u3a.org.uk/learning>

### **Copyright**

Wu3a holds a CLA licence which covers photocopying extracts from books and magazines. National u3a hold a MPLC licence which covers showing films from over 900 studios. They also hold a PPL licence that covers all use of recorded music.

### **Equal Opportunities**

Please note that Wu3a is committed to the treatment of everyone equally and without discrimination or prejudice on the grounds of age, race, ethnic origin, nationality, cultural or educational background, gender, sexual orientation, disability, social standing, or religion.

## **Useful Info**

### **Websites**

Our website: [www.waterloovilleu3a.org.uk](http://www.waterloovilleu3a.org.uk)

To access the Members' Area, click Members Area and enter the Username of 'u3amember' and the password of 'u3apassword'.

South Central Network of u3as	<a href="http://u3asites.org.uk/hants-sc-network">u3asites.org.uk/hants-sc-network</a>
South East Region of u3as	<a href="http://u3asites.org.uk/code/u3asite.php?site=465">u3asites.org.uk/code/u3asite.php?site=465</a>
National u3a (Third Age Trust)	<a href="http://www.u3a.org.uk">www.u3a.org.uk</a>

### **Emails**

Groups Treasurer	<a href="mailto:groupstreasurer@waterloovilleu3a.org.uk">groupstreasurer@waterloovilleu3a.org.uk</a>
Finance Treasurer	<a href="mailto:treasurer@waterloovilleu3a.org.uk">treasurer@waterloovilleu3a.org.uk</a>
Group Liaison	<a href="mailto:groups@waterloovilleu3a.org.uk">groups@waterloovilleu3a.org.uk</a>
Beacon Administrator	<a href="mailto:beacon@waterloovilleu3a.org.uk">beacon@waterloovilleu3a.org.uk</a>
To borrow equipment	<a href="mailto:equipment@waterloovilleu3a.org.uk">equipment@waterloovilleu3a.org.uk</a>
Membership Secretary	<a href="mailto:members@waterloovilleu3a.org.uk">members@waterloovilleu3a.org.uk</a>
Business Secretary	<a href="mailto:secretary@waterloovilleu3a.org.uk">secretary@waterloovilleu3a.org.uk</a>

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