

Chalfonts U3A - Advice for Convenors July 2018

1. Thank you...

On behalf of Chalfonts U3A for helping to set up and/or manage an Interest Group. Interest Groups are the life-blood of the U3A. Although you have agreed to be a Convenor you do not have to be an expert but rather a willing volunteer able to get a new Group off the ground or to take over or share the management of an existing Group.

2. Groups Coordinator

The joint Groups Coordinators are:

Nigel Trotman 01494 873701 groupcoordinator1@chalfontsu3a.org.uk

Sue Fisher 01753 880804 groupcoordinator2@chalfontsu3a.org.uk

Our role, assisted by other members of the Committee is to help and advise group convenors in every possible way. Periodic meetings of Convenors are arranged to review progress and to discuss and resolve any matters of concern. Please advise the Groups Coordinator if a Group reaches maximum capacity so that an additional Group can be formed should there be demand.

3. Starting a Group

Anyone wishing to start a new Group should notify a Groups Coordinator, (as above). Publicity can then be given via the monthly Members' Meeting, the Newsletter and the Website. As we now have a large number of interest groups, we would advise that before deciding on the day/time to hold your meetings, the "At a Glance Interest Group Guide" is used to avoid clashes. The guide can be found on the Chalfonts U3A website, under the heading "Interest Groups".

4. Interest Groups: Subject Content

Members will want to consider what they would like to do in terms of the nature, range and content of the subject and the envisaged timescale. Consider how you want to achieve these goals, what knowledge is already held within the Group and the resources members can contribute. Also how will the Group be organised and who can help. Remember that meetings should be fun and that many people prefer a variety of methods of presentation. Regular planning meetings may be necessary. It is appreciated that some Groups will be led by experts whilst others will divide responsibility for research and study preparation amongst members. Interest Groups should not invite paid Speakers except in special circumstances. The cost of hiring a Speaker must be met by the Group involved. Please inform the Groups Coordinator if this is intended. One model will not fit all and we are sure that new members will be found to be brimming with unleashed talent. So enjoy being creative.

5. Study Methods and Materials

Consider also what study methods are available, for example textbooks, other reading material, DVDs and material available online. Are there any volunteer experts who can demonstrate and share their skills? Please also take advantage of the resources available from U3A National Office www.u3a.org.uk which has experts ready to advise on a wide variety of subjects and who can also advise on the range and most appropriate study materials available from the U3A National Office resource centre. Subject Advisors appear in each issue of Third Age Matters.

6. Membership Check and Attendance Register

Convenors should satisfy themselves that members attending their interest group have an up to date membership and keep a record of attendance on a simple register. Names of group members should be listed on the Chalfonts U3A Beacon website, and updated as required. Instruction on access to and use of the Beacon system can be given by Val Darbyshire, Beacon Administrator, beaconadmin@chalfontsu3a.org.uk. The Beacon system is designed to make your life easier by having an up to date list of members and facility for sending group emails. The decision to use the system is up to you. Names of your group members can be entered on to Beacon by your Group Coordinators if requested. Convenors need not personally enter information on to the Beacon system, they can appoint an administrator or helper. Members can invite a guest to Interest Group activities, but only if this does not prevent a group member from attending the activity. Guests can only be invited up to three times in a U3A year. The insurance policy covering public liability risks only covers members of Chalfonts U3A.

7. Financial Accounts

Each U3A Committee is responsible for all financial transactions within their own U3A. A Treasurer is appointed to record all such transactions to the Committee and produce an annual account to the membership. In an ideal world, the Treasurer should pay all bills, obtain receipts and maintain a detailed bookkeeping system. However, it is recognised that in large U3As, such as ours, that this is not always possible or practical. It is therefore pragmatic to allow group convenors/administrators to keep their own accounts on a day to day basis. If you adopt this protocol, then it is essential that these accounts are submitted to the Treasurer on a frequent and regular basis. All these accounts MUST be included in the annual account for our U3A. The Beacon Ledger page is available to group convenors/administrators, which will simplify accounts, and do all the maths.

8. Other Interest Group Funds

Costs relating to Group activities other than venue accommodation must be met by Group members. It is suggested that the simplest method of collection is for such costs to be recovered from members as a flat charge per attendance, in addition to any per head accommodation cost where it applies. Convenors should, for their own convenience and so that there is a proper record of all U3A Interest Group costs, keep a simple written record in the form of a summary sheet of all income and expenditure for the Group under the headings: date/brief description of item/income/expenditure/balance. Invoices and receipts, where available, should be retained. Smaller Groups will probably meet in the homes of individual members homes by rotation and share any incidental costs on an informal basis. Members should be made aware that if they cancel a booked place for attendance to an event, that refunds should only be given if a replacement is found. Any monies or cheques to be paid in to Chalfonts U3A for group activities should be passed to the Treasurer. Alternative direct means of paying in can be arranged. For details please contact The Treasurer. 11 West Common Close, Gerrards Cross. SL9 7QR. treasurer@chalfontsu3a.org.uk. Group Visits. (ie. Theatre Trips, London Walks, Outings and Excursions, Canal Boat Trips, New Experiences, Garden Visits, Walking Weekends). Each individual visit should be planned to break even, so your financial projections should allow for a small contingency in case of unexpected costs, and should not include member cancellations. If a member cancels then refunds should only be given if a replacement is found. If any planned activity indicates that a loss will arise contact Peter Brady, Treasurer, before committing expenditures. Group activities can involve making financial commitments such as deposits or payments in advance to suppliers. Contributions from participating members should be collected as early as possible in order to cover all such expenditures. For insurance purposes, when transport etc is booked by a convenor, it is essential that the booking must be made in the name of "Chalfonts U3A", and payments must be made via the Chalfonts U3A bank account, not from a private account.,

9. Accommodation Hire

In order to comply with insurance requirements, the Committee takes responsibility for any contract for accommodation for Interest Groups, whether at the Community Centre or elsewhere. All arrangements should be made through Jan Sawyer, Venue Coordinator, 01753 885741 venuecoordinator@chalfontsu3a.org.uk, who can advise on availability and should be consulted on any proposal for new, or a change in accommodation. If accommodation is booked at venues other than the Community Centre it may be necessary for the group to cover hire costs. You will be advised of the position prior to the booking being finalised. In fairness to the Chalfonts U3A membership as a whole, all Interest Groups are self-financing subject to a special provision relating to the cost of accommodation. We are presently in a trial period where accommodation in the Community Centre is hired at no cost to individual Interest Groups attending each session. Convenors will be informed of any change to this arrangement. If a group wishes not to use accommodation in the Community Centre on a particular date please inform Jan Sawyer, to enable the room cost to Chalfonts U3A to be reclaimed. Monies collected towards accommodation costs should be collected by the group convenor/administrator and transferred at the end of each quarter by cheque to the Treasurer. Details as above. The cheque should be made payable to "Chalfonts U3A". The cheque should be accompanied by a copy of the Register(s) which should include the following: Name of the Group and person sending the cheque. Name of the venue, date and start/end times of the room bookings (will probably not change but information needed to allow it to be checked against the invoice). The number of attendees per session.

10. Data Protection

The protection of members' personal data is of paramount importance. In May 2018 new legislation was enacted to provide individuals with enhanced rights to access to data held and further responsibilities to those organisations holding such data. (General Data Protection Regulations 2018) "Consent" forms have been sent out to all members to obtain their consent to use their data for U3A only purposes. The "consent element" of the new legislation is now included in the new Membership Application Form. At Chalfonts U3A we subscribe to the 'Beacon system'. This is a recognised U3A computer system dedicated to the secure storage of members' data. We would urge all convenors/administrators to become users of the system. The system has many benefits, including, keeping records up to date and enabling Convenors to transmit emails to group members with ease. Before contacting members by electronic means be alert to the fact that not all members have yet completed their GDPR consent forms. If unsure please contact a Committee member who will be able to check the Beacon system for you. It will rarely be necessary to disseminate members individual addresses. Data protection is straightforward and just needs to be applied within the guidelines. Help, advice and guidance is readily available should you require it.

11. Equipment

Chalfonts U3A owns two projectors, a screen, two laptop computers and two Chalfonts U3A banners. Convenors should contact Mary Kendall (mary.kendall1@btinternet.com) should they wish to check availability for use at Group Meetings. Mary Kendall is also prepared, by arrangement, to demonstrate how the equipment operates. Please ensure that whoever operates the equipment follows any guidelines provided and checks that all items (particularly accessories such as leads) are stowed with the right principal items.

12. Please note that:

- a) Convenors are advised to use the 'blind' copy (bcc) facility when sending Group emails if not using Beacon to assist in maintaining data protection. The Beacon system automatically sends blind copies, thus providing privacy and protection.
- b) Convenors may find it helpful to download an 8 page 'Interest Groups' booklet from U3A National Office via the website: www.u3a.org.uk

....And thanks

again for helping to make such a vital activity within Chalfonts U3A a success.
Remember that your Groups Coordinators are always there to give help and a guiding hand.