

## INTRODUCTION

Thank you for agreeing to organise an interest group. We are sure you will find it very rewarding. This handbook is intended to provide advice and support to you as a Convenor. Not all of the content may be relevant to all convenors, particularly those who are already doing the job. However, it is intended to provide common ground for the understanding of the role and how the u3a works.

## YOUR COMMITTEE AND HOW THEY HELP YOU

The Committee is made up of five trustees – Chair, Vice Chair, Treasurer, Secretary and Membership Secretary; plus the Groups Secretary, the Venues Secretary and an invitee member who looks after our website and our use of the u3a Beacon system.

The Committee are committed to providing as much information as possible to the members. Some of this can be fed through by Convenors. We provide a number of information events including a termly coffee morning for Convenors, and the Chair or other Committee members provide email updates. We also produce a termly newsletter which is emailed or posted out to all members.

The **Venues Secretary** ([venues@wimborneu3a.org.uk](mailto:venues@wimborneu3a.org.uk)) is responsible for booking all venues that we hire for our groups. Accommodation will normally be booked for a group only where the class size is seven or more. Classes with six members or fewer will otherwise be expected to meet in a member's home unless this is precluded by the nature of the activity, in which case the Group cannot run. The Venues Secretary will contact you to discuss the requirements you have for your group in terms of location, dates and times and will do all the booking for you. As part of their role they will ascertain the maximum number of people which your venue can cater for, which may impact on your maximum group size. Should you have any issues to do with the venue then you should discuss them with the Venues Secretary.

The **Groups Secretary** ([groups@wimborneu3a.org.uk](mailto:groups@wimborneu3a.org.uk)) is responsible for the day to day issues in running our groups. They will contact you to ensure that everything is running smoothly within your group and oversee the administration involved such as the risk assessment and attendance registers. Should any issue arise within your group then you should discuss it with the Groups Secretary as soon as possible.

The **Membership Secretary** ([membership@wimborneu3a.org.uk](mailto:membership@wimborneu3a.org.uk)) is responsible for the administration of your group's composition. They will provide you with a register pro forma at the start of each year and inform you if new members wish to join your group.

The **Equipment Manager** is responsible for the equipment which is owned by Wimborne u3a and used by its groups. If required, please contact the Secretary to find out which of the committee is currently fulfilling this role. You should contact the Equipment Manager if there is a specific piece of equipment you require for your group or if a piece of equipment you are using needs attention.

The **Chair** ([chair@wimborneu3a.org.uk](mailto:chair@wimborneu3a.org.uk)) is available at all times to discuss any issue that you have with your group, or where an issue has not been resolved to your satisfaction by the committee member responsible for it.

## THE BEACON SYSTEM

A central part of the u3a information management is Beacon, which is a software application that many u3as use nationally. This system manages the application process and provides a detailed database of all members, the groups they are in, donations paid and so on. There are areas of Beacon which are available to convenors to help them access information about their groups. It is essential that as a convenor you understand Beacon and can access it. Training on how to use Beacon will be provided for all convenors.

## [www.wimborneu3a.org.uk](http://www.wimborneu3a.org.uk)

Wimborne u3a also has a website which provides a range of information about groups,, events, etc. The website has a section where all the policies and other information about the organisation, which are referenced in this handbook, can be found. We also publish a newsletter three times a year.

## POLICIES AND PROCEDURES

Your committee and/or Groups Secretary can advise on the policies and procedures that you need to be aware of. These will include matters concerning:

- Finance
- Data protection
- Health and Safety
- Safeguarding
- Equality, diversity and inclusion
- Accessibility
- Complaints
- Risk Assessment and incident reporting

Wimborne u3a has detailed policies relating to all these issues; they can be found on the website.

## **DUTIES OF THE CONVENOR – WHAT YOU HAVE TO DO**

**Group Activity** – As convenor you are responsible, in conjunction with group members, for how group sessions are organised and run. In some groups the convenor does all the organisation, while in others group members are delegated to do certain tasks. It is the convenor's responsibility to open up venues as necessary and to ensure they are closed at the end of the session. Venues should be left in the same condition as they are found, any furniture that is moved should be returned to its place and any mess created cleaned up. Any issues with the venue should be reported to the Venues Secretary asap.

**Class Register** – A Class Register must be taken at the beginning of each session. The register should be used as a basis of a roll call in the event of an emergency evacuation of the venue. Only Wimborne u3a members holding a Membership Card for the current year commencing 1st September are entitled to attend a Class. Offering an initial single "Taster Session" to an individual is at the discretion of the convenor.

Once a hired-venue group has started, a member who, without good reason, is absent from three consecutive sessions may be removed from the register. This is a tricky path to tread, and the convenor's discretion is principal. Please monitor attendance and discuss with the Groups Secretary before any decision is taken. If a member is removed for any reason you should inform the Membership Secretary so that the group's details on Beacon can be updated.

Registers should be sent in to the Groups Secretary at the end of each term.

**Group Cancellation** – If you need to cancel a session, please give as much notice as possible. It is your responsibility to inform members, the venue, and the Venues Secretary.

If you are unable to attend a session and have arranged for another member of the group to lead the session, you should inform the Venues Secretary and the Groups Secretary in case any issues arise.

**Health and Safety** – All convenors are responsible for the health and safety of their group members in as far as they have a Duty of Care. This is no different to the care you would exercise in your own home to your family, friends and visitors. The Third Age Trust nationally provides all u3a members with insurance protection against any accidents that may occur when a group is in session. However, this is contingent on the u3a having followed appropriate procedures regarding health and safety and safeguarding of vulnerable adults.

1. **Risk Assessments** – All convenors are required to complete a risk assessment for their group. Risk assessment forms can be acquired from the Groups Secretary to whom completed forms should be returned. You should retain a copy of the risk assessment form to show to group members if requested.
2. **Venue Awareness** – As convenor, you should make yourself and the group members aware of (a) all emergency exits and the correct pathway to them, (b) the location of fire alarm buttons, fire extinguishers, fire blankets and first aid kits and (c) emergency assembly points outside the venue.
3. **Fire Procedures** – if a fire is detected you should lead your group to safety (do not waste time collecting belongings) and raise the alarm. Once outside the building a roll call should be taken using the class register to ensure all group members are accounted for.
4. **Other Perils** – As convenor, you should be aware of potential hazards which may exist within a room even before group members enter it; these may already have been recorded on the risk assessment form. Any item of danger should be reported to the building's representative, if present at the time, otherwise a note should be left for the owners and reported to the Venues Secretary.
5. **Incident Report Forms** – An incident report form must be completed if there is an incident/accident during a group session. Incident Report Forms are available from our website or the Groups Secretary, to whom all completed forms should be returned. It would be prudent to have a copy of an incident report form with you at each session so that it can be completed when witnesses are available and the incident is fresh in their minds.
6. **Emergency Contact Details** – It is prudent to ask members to provide emergency contact details including basic medical information in case they have an accident and are unable to provide that information at the time. This is a voluntary requirement, but all members should be encouraged to provide the information. One way of doing this is to ask group members to put the information in a sealed envelope that would only be opened should the need arise. A medical information pro forma is available from the Secretary.

Our Health and Safety Policy is available on the website.

**Data Protection** – As convenor, you should make yourself aware of our Data Protection Policy, and act accordingly when dealing with any personal information you may have access to as a group convenor. When emailing your group from your personal email account you should always use the Bcc facility so that individual's email addresses do not appear to all members being emailed. If you use the email facility on Beacon this is done automatically. The detailed Policy is available to you and all members on the website.

**End of the Year Renewal** – In the Spring Term you will be asked by the Venues Secretary if you are willing to continue to run your group in the next academic year, so that venues can

be booked. Later you will be asked to check, and amend if necessary, the group description that appears in the Annual Programme.

In the Summer Term you will be asked to complete a convenor's questionnaire in which you will have the opportunity to feedback how you think the year has gone and any suggestions as to how things could be improved.

**Miscellaneous** – From time to time you may be asked for a written article or photographs of your group for use in our publications, for example the termly newsletter or for publicity use. Of course you do not need to wait to be asked, we would welcome photographs or articles at any time by sending an email to: [info@wimborneu3a.org.uk](mailto:info@wimborneu3a.org.uk)  
You may also be invited to participate in meet and greet information events we hold to publicise Wimborne u3a.

## GROUPS THAT MEET IN A MEMBER'S HOME

For groups of 6 or less, members usually meet in the convenor's home, or that of another group member, in rotation. Decisions on how to manage the use of their homes as venues are to be made by the relevant convenor and group members. Those decisions should be reported to the Groups Secretary by the convenor.

## DEALING WITH RELATIONSHIP ISSUES WITHIN YOUR GROUP

Sometimes issues can arise within a group that disrupt the smooth running and can spoil the enjoyment for everyone. Do not leave a problem too long before trying to resolve it. Talk to the Groups Secretary or other committee member if unsure how to resolve the problem or you just want someone to explore options with.

Issues you may encounter:

- If a member's behaviour is frequently disturbing other members of the group and the convenor feels comfortable dealing with the issue in the first instance, then that can be done. Alternatively, seek additional support from the Groups Secretary
- If there is a very serious problem or argument in a session, it may be necessary to ask a member to leave for the remainder of the session. If this occurs, please contact the Groups Secretary as soon as possible after the end of the session.
- If a member who is not able to cope independently comes to a meeting without a 'carer', inform the Groups Secretary as soon as possible to discuss how best to resolve this situation.

## **COPYRIGHT**

Wimborne u3a has a CLA licence from the national body, the Third Age Trust, that allows some materials, within limits, for educational use within groups. The Trust also provides a PPL (Phonographic Performance) PRS licence to cover the playing of music and an MPLC licence to cover the showing of films. These are included in the fee that u3as pay to the Trust. There are limitations to each of these licences and if you are going to be using copyright material in any form, for example, printed, audio or pictures, please check with the Groups Secretary before going ahead.

## **INSURANCE**

The Third Age Trust nationally provides all u3a members with insurance protection against any accidents that may occur when a group is in session. The details of the insurance cover and the answer to many frequently asked questions can be found on the Member's Area of the U3A website: [www.u3a.org.uk](http://www.u3a.org.uk). Having registered and logged on as a member you need to click on 'Members Area', then choose 'Support for u3as', then choose 'Advice and Guidance' and then scroll down to find the insurance section.

## **NATIONAL U3A HELP AND SUPPORT**

The National u3a offers a wide range of support and resources which you may find of use in running your group. These can be found on their website: [www.u3a.org.uk](http://www.u3a.org.uk). Some of the resources are listed below.

- Subject Advisers are Trust Volunteers with specialist knowledge in a wide range of topics. Their contact details are available on the u3a website and in the Third Age Matters magazine. Subject Advisers can provide advice on both the setting up of a group in their subject area and the sustainability of ones already in existence, which may benefit from new ideas or a different approach.
- u3a Subject Networks provide a platform for u3a members to connect and come together around their interests.
- u3a Subject Surgeries are an opportunity to share resources and ideas, as well as access help setting up a group within your u3a, all members are welcome. These are set up on a case-by-case basis throughout the year and can be found on the national u3a website under 'Learning events'.
- National u3a learning programmes showcase a wide range of learning activities online for members to get involved in.
- Networks, regions and neighbouring u3as allow you to draw on experience from within the movement.

- u3a Friends Newsletter is a monthly e-newsletter, which can be subscribed to by members and non-u3a members on the u3a national website.
- Third Age Trust Workshops, the u3a office and Trust Volunteer Trainers run online workshops to support all members, including 'Interest Group Matters' which covers the information in this handbook and more. The workshops also provide an opportunity to meet other u3a members from across the country. More information about other workshop topics, how to book or request a workshop for your u3a, can be found on the u3a national website.
- The u3a national office can be contacted if you have questions that can't be answered by your Committee. Email: [u3a.office@u3a.org.uk](mailto:u3a.office@u3a.org.uk) or telephone: 020 8466 6139

## IN CONCLUSION

Thank you once again for volunteering your time and your expertise, and remember if you need any help with your group you can always contact one of the committee.

