

## Group Coordinator: Advice and Checklist

Thank you for being a group coordinator for u3a Sheffield. Our groups are the centre of activities and could not operate without volunteers like you. Hopefully you find the role rewarding and fun. There is an expectation that groups will be properly run, adhering to policies developed to secure the health and wellbeing of members. Help is available if needed. The General Coordinator at [groupsa@su3a.org.uk](mailto:groupsa@su3a.org.uk) is your first port of call if you need help and will signpost to others if needed. How to guides are at the end of this advice document.

### Key responsibilities in brief

1. You may wish to keep a record of attendance at your group, as required by your venue, or to manage your membership.
2. Welcome newcomers to your group but check that they are eligible to join.
3. Communicate regularly with your group and with Su3a as required.
4. Understand what it means to comply with the requirements of General Data Protection Regulations (GDPR).
5. Look after any money or equipment belonging to your group.
6. Think about safety and accessibility when running your group and prepare a risk assessment record as needed.
7. Look for support from within your group and seek help from Su3a as needed.
8. Understand and be aware of the 3 principles of the U3A movement:
  - open to all who are no longer employed full-time;
  - promote the value of lifelong learning; and
  - remove all barriers to joining.

### Responsibilities in more detail

	Task	Support	Timing
1	<b>Keep a register of attendance</b>		
1.1	Each year you will be asked to confirm membership of your group including membership numbers	Group records	February/March
1.2	Add new members and remove members who leave	Group records	As required
1.3	Only registered members are covered by insurance. More information about insurance can be found on the <a href="#">website</a> .	General coordinator Treasurer	

2	<b>Welcome newcomers</b>		
2.1	Check that newcomers are members of Su3a	General coordinator	As required
2.2	New members can complete a trial of no more than 2 sessions before joining Su3a	General coordinator	As required
2.3	Guests can attend social events		
2.4	Contact members who stop attending. Are there any welfare issues or conflicts within the group? <a href="#">Sorting out problems</a> .	General coordinator	As required
2.5	You may keep a waiting list of prospective members but a new group may also be an option	General coordinator	As required

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3	<b>Communications</b>		
3.1	Check that the description of your group on the website is correct. Log on and make any changes needed. Consider setting up a group web page.	General coordinator	At group set up and following any changes
3.2	Communicate with your group regularly by email, face to face and by phone, as appropriate. Arrange Zoom activities, if possible, if meetings can't go ahead. <a href="#">Advice about going on-line</a> .	General coordinator	As required
3.3	Respond to requests for information from Su3a and u3a	General coordinator	As required
3.4	Provide information and articles for publication	Website editor Newsletter editor	As required
3.5	Attend regular networking reception for group coordinators	General coordinator	As required
3.6	Advertise for new members in Su3a communications, using the private Facebook page and on the website	General coordinator	As required
3.7	We have a <a href="#">copyright licence</a> for limited insubstantial copying of study materials, etc	General coordinator	As required
3.8	Use Links, Facebook, newsletters and your web page to publicise your group activities	General coordinator	As required

4	<b>Compliance with GDPR and privacy rules</b>		
4.1	Be aware of Su3a policies governing the data we hold <a href="#">Privacy and Data Protection Policies</a>	General coordinator	
4.2	Personal information (including telephone numbers and email addresses) of a member must not be shared with other members without explicit permission from the member. General emails can be issued by Su3a administrators if needed. Using <b>bcc</b> in emails prevents members seeing each other's email addresses.	General coordinator	
4.3	Any device (computer, tablet etc.) holding personal information of group members must be protected with a password	General coordinator	As required
4.4	If you, as group co-ordinator, do not use email ask someone in your group to be your email contact as this is the preferred method for general communications	General coordinator	As required
4.5	As group coordinator, you give consent for your contact details to be shared with Su3a members via the website, print and online communications	General coordinator	As required

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5	<b>Money and equipment</b>		
5.1	Many groups have no equipment and no group monies	Not applicable	
5.2	Any money collected for group activities belongs to the group and must be accounted for. Su3a retains ultimate responsibility.	Financial officer Treasurer	At least annually February/March
5.3	Small payments made to a host for refreshments do not need to be recorded	Not applicable	
5.4	<a href="#">Guidance</a> (Appendix 1, Page 7) is available to help with budgeting for recurring costs, calculating member contributions, maintaining records and updating annual returns. <a href="#">Finance Policy</a> .	Financial officer Treasurer	As required
5.5	Members making payments should keep receipts to support annual reports	Financial officer Treasurer	As required
5.6	<a href="#">Grants</a> may be available for the purchase of equipment	Treasurer	As required

6	<b>Safety and Accessibility</b>		
6.1	Before setting up your group assess the risk involved and complete a risk assessment. There are <a href="#">sample risk assessments</a> on our website for groups meeting in public or hired venues and private homes. There is also a checklist for walking groups. For further information see the <a href="#">Su3a Health and Safety Policy</a> .	General coordinator Health and safety adviser	As required
6.2	National activity associations may also provide up to date guidance and risk assessments, eg Ramblers Association	General coordinator Health and safety adviser	
6.3	Share risk assessments with group members and get their agreement to adhere to risk management provisions	General coordinator Health and safety adviser	As required
6.4	U3A has liability insurance which covers all Su3a groups. See <a href="#">cover note</a> on website.	General coordinator Health and safety adviser	
6.5	Complete an <a href="#">Incident Report Form</a> as soon as possible after an incident or injury and send it to the Business Secretary	Business Secretary Health and safety adviser	As required
6.6	Be aware of Su3a <a href="#">safeguarding provisions</a> .	General coordinator Health and safety adviser	As required
6.7	Remember to consider 'reasonable adjustments' to widen accessibility	General coordinator Health and safety adviser	As required
6.8	A list of <a href="#">venues</a> can be found on the website.	General coordinator	As required

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7	<b>Support and Help</b>		
7.1	Identify a deputy who can run your group when you are absent. Details can be recorded on the website.	General coordinator	
7.2	Getting more people involved in running your group helps to share the work and develop new group co-ordinators for the future	General coordinator	
7.3	If anything goes wrong, consult the <a href="#">‘sorting out problems’ document</a> on the website or talk to the General Coordinator. Sometimes it’s good to get a second opinion before taking action.	General coordinator	As required

8	<b>Principles of the u3a movement</b>		
8.1	Be familiar with the principles of u3a	<a href="http://u3a.org.uk/about/vision">u3a.org.uk/about/vision</a>	

### How to

#### Run your group

The role of a coordinator will vary from group to group. You may have a structured plan with some degree of guidance and tuition, eg languages, or you may coordinate events or visits. As coordinator you are responsible for the content, duration and administration of meetings. The venue, frequency and timing of meetings, along with housekeeping, can be discussed and agreed with group members. Once a group has been set up on the website you can change any of these details when you ‘log in’ and access ‘your profile’.

You don’t have to do everything yourself. Appoint a deputy so that meetings can continue in your absence. Is someone willing to look after group finances?

Most are happy to take an active part in activities. Many may be willing to host meetings in turn. Consider the skills and experience of your members when pitching meeting content. How would new members be accommodated? How does the group stay vibrant and interesting over time?

You can use the website to ‘send group email’, by accessing the ‘Information For Group Coordinators’ page.

#### Create a membership register

A record should be kept of group members and their Su3a member number. This is important because only Su3a members are insured. At least once a year you should check these details on the Su3a membership website.

Guidance (Appendix 2, page 8) is available to explain how to make use of the website to check your group’s membership, make changes as people come and go, and to produce a checklist of your members.

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### **Manage risk**

#### **Data**

Refer to the Data Protection and privacy policies on the website, under the about Su3a banner.

Keep personal information secure.

Only share information with the explicit permission of the person.

Only keep information needed to run your group.

If someone withdraws permission to keep information, destroy it.

Destroy information securely, by shredding or similar.

#### **Money**

Refer to the Finance Policy on the website, and the extract specifically for group finances at the end of this document. [Section 3 \(page 3\)](#) of the policy specifically covers Interest Group's financial responsibilities.

Be self-financing and do not go into debt.

Set your own subscriptions to cover expected costs.

You may need a bank account and this is acceptable although u3a Sheffield must form part of the account name. See [Section 6 \(page 5\)](#) of the Finance Policy for more details.

All monies belong to your group as restricted funds.

Appoint a Treasurer and keep financial records.

Report your finances annually to the Su3a Treasurer, using the link provided. Talk to your allocated Financial Officer if needed.

Larger groups need to appoint an Independent Examiner to review financial records. This can be someone from another group or your allocated Financial Officer.

For other miscellaneous circumstances see [Section 8 \(page 7\)](#) of the Finance Policy which covers paid tutors, organised trips and inactive groups.

#### **Safety**

Carry out a risk assessment – when you start the group, and every time you meet, reducing risks whenever possible.

Keep Attendance Records, if required by your venue.

Record full details of all accidents and incidents, and near misses, using the form on the website.

Keep emergency contact details for each member in case of accident or incident. Encourage members to carry this information with them, in case of emergency.

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### Get help

There are lots of guidance documents and policies on our website. You just need to know where to look. Check 'Information for Group Coordinators' button under the main blue banner initially. Policies can be found under the 'About Su3a' banner.

There's also a General Coordinator (email: [groupsa@Su3a.org.uk](mailto:groupsa@Su3a.org.uk)) together with a Group Records team, a financial team, and someone looking after Risk Assessment requirements. Group Coordinators can approach the appropriate person or team directly rather than going through the General Coordinator.

To summarise:

- Groups Records: Contact to report changes to your Group that should appear on the web and in Centre Pages of Links and to report changes to your Group membership. (email [grouprecords@Su3a.org.uk](mailto:grouprecords@Su3a.org.uk)), if you are unable to make these changes yourself or you'd appreciate some support doing this.
- Home Pages: Contact the nominated Officer if you want to set up a home page for your group, or changes are needed (email [homepages@su3a.org.uk](mailto:homepages@su3a.org.uk))
- Financial Queries: Contact the financial officer who has previously discussed your financial arrangements with you.
- Risk Assessment: Contact the nominated EC member who is looking after this.
- Anything else: Contact the General Coordinator or deputy. In particular, if you are thinking of forming a new Group this is the contact.

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### **Appendix 1 – Guidance for Interest Groups Financial Accounting**

#### **Accounting Rules – Introduced from 1<sup>st</sup> January 2022**

- These rules involve including the accounts of all Interest Groups with relevant transactions into the accounts of Sheffield U3A.
- The first submission will be in January 2023 for the year ended 31<sup>st</sup> December 2022, but for comparison purposes all transactions for 1<sup>st</sup> January 2021 are affected.
- The way Interest groups are run is not affected.

#### Key Principles for the new rules

- Transactions which go through a Group's cash tin and/or bank account must be included in the group's accounts
- Group's moneys and assets belong only to that group. They are restricted funds for that Group.
- Only Groups with "included" transactions (see below) need to produce accounts.

#### Typical Transactions - included

- Refreshments – Members pay for tea & biscuits into a group tin and cash is used to buy more. Refreshments belong to the group. (Exclude if members pay host directly)
- Consumables (playing cards, score sheets, first aid kit) – Members pay (say) £1 into group tin and cash in tin is used to buy consumables. Consumables belong to the group. (Exclude if provided by a member and other members pay to the provider direct)
- Administration costs – printer ink, postage, stationery – Members pay an agreed amount into the group tin / bank (Exclude if provided by a member)
- Music, maps etc – bought using group monies – belong to the group (Exclude if provided by a member and other members pay a sum to the provider)
- Laptops, projectors, cameras – Invoice is addressed to the group, items belong to the group. (exclude if provided by a member and other members pay a fee direct to the provider)
- Venue hire – the Group contracts with the venue and pays a set hire fee. Members pay an agreed sum into the group cash tin / bank. The group may incur a loss or a gain.(Exclude if fees paid direct by members to the provider)
- Restaurant – Meal organiser pays restaurant from cash tin/ bank and members pay into tin/ bank (Exclude if members pay the restaurant directly)
- Coach hire for Away Day – Leader agrees hire with coach company, pays invoice in cash/bank, members pay set fee into cash/bank. (Exclude if members each pay coach hire company direct)
- Travel costs on theatre trip – group sets agreed rates for payment and reimbursement. Members pay into group tin and driver claims reimbursement from tin. Group may gain/lose. (Exclude if members pay driver directly)
- Theatre bookings – Leader buys tickets and members pay into group tin/bank.(Exclude if booking is direct between theatre and member)
- Hotel bookings – Leader pay for rooms and members pay into tin/bank – not recommended (Exclude if members contract is direct with hotel and member)
- Travel group holiday – If group acts as "principal" and arranges trip, contracts with airlines, hotels etc in the name of the group and members pay into group cash/bank .(Exclude if group work with a tour operator who organises the trip, and members each pay the operator directly)

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### **Appendix 2 – Guidance for Updating the Website**

Coordinators can now manage much of the Group's web entry themselves. Group Records and the General Coordinator will support and offer help if needed.

To change things yourself you will need to Log in, choosing the option on the main web page.

#### **To change information about the group(s) you coordinate**

Select 'Your profile' - the last button in the banner of options on the main web page

On the 'user dashboard', Scroll to the area under 'Your Events'

Under Relationship - Group coordinator of – select the 'Update' option

Here you can change –

- Vacancies
- Day, Time and Frequency
- Meeting arrangements
- Answers to specific questions
- Information about your group

REMEMBER to update any changes you make at the bottom of the page before leaving the page

To add photos and any links to documents to your group's web entry, send them to the Home Pages Manager by email to [homepages@su3a.org.uk](mailto:homepages@su3a.org.uk)

The members of your group(s) are list at the bottom of the 'User Dashboard' page.

#### **To Get a list of Group Members, Update Group Members and To Email your Group Members**

Go to the 'Information for Group Coordinators'

Select the group you want to access, highlighted blue

At the bottom of the list of members are links to –

'Update membership list'

- You will need a member's membership number to add them to your group
- There is the option to remove a member by checking the box by their entry, and then selecting the option 'remove checked members'
- REMEMBER to select 'List of members is correct' at the bottom of the page, before leaving the page, to save any changes

'Update Group Details' – which takes you to the same page as mentioned above

'Download file' – will allow you to produce a list of your members to be used in any spreadsheet software, for instance, for use at meetings as a register



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'Send Group Email' – opens a form in your default emailing system, populating group members' email addresses in bcc (blind copy functionality). You can then go on to create your email text, possibly putting your own email address in the 'To' field.