



**SAFFRON WALDEN u3a  
GROUP COORDINATORS'  
GUIDE**

**January 2022**

## **Purpose of this Guide**

The purpose of this guide is to ensure that Coordinators have the information they need to comply with the Saffron Walden u3a aims and working practices.

It is particularly important that Group Coordinators are aware of the u3a ethos. It is based on the three principles:

Third Age Principles

Self-help Learning Principle

The Mutual Aid Principle

This Guide contains advice on a number of issues, which may arise as you run your group. Coordinators should also be aware of the facilities and support offered by The Third Age Trust on its web site ([www.u3a.org.uk](http://www.u3a.org.uk)).

## **Role of the Coordinator**

The Group Coordinator is the lynch pin within our u3a organisation, being the person responsible for the organisation, running and administration of the group.

This is best summarised as:

1. Organise the group of people attending the classes;
2. Carry out administration of the class by establishing that each member has a current membership card, maintaining a class register, keeping a record of membership details for each person;
3. Be responsible for the financial aspects of the group;
4. Be aware of the health & safety requirements and risks for the venue being used and reminding members of those requirements at each meeting;
5. Create a plan and course content for the term as required;
6. Nominate a deputy to act in case of sickness or other enforced absence;
7. Provide members with a contact list of all members for emergencies;
8. Liaise with our Treasurer and Activities Organiser to book and pay for the venue, and tutor if applicable, used by the group.

## **Essential Administration**

Coordinators need to be conversant with the forms set out below and how to use them. All forms are available to download from the Saffron Walden web site by signing in to the Coordinators Only page under 'Contacts'.





## Essential Finance

A copy of the Saffron Walden u3a Finance Policy, which sets out all guidelines to be followed, is available on our website under 'Publications'.

Having established, with the help of the Activities Organiser and Treasurer, where sessions are to be held and the cost per session, the Coordinator needs to set the cost per member for the term, which, of course, the Coordinator will tell members in advance.

As it is normal for venues to ask for payment in advance, the Coordinator needs to emphasise to members that their contribution is required immediately the term begins. Failure to pay promptly may result in membership of the group being withdrawn.

A number of our groups operate in private houses. This means that no subscription is payable but it usually results in members making a contribution for refreshments.

The next sections help you through the various financial stages.

It is important that Coordinators liaise with the Treasurer in all financial matters. They must ensure that they complete and submit all paperwork promptly and abide by the guidance in the Finance Policy Document.


Coordinators need to be aware that payments to group funds by members are deemed to be donations to charity. Under charity law refunds for any reason are not permitted.

### Calculating the Cost per member per Term Example

<b>Example: Monopoly Group</b>	
20 members meet in a hall 10 times per term	
Costs:	
Hall hire @ £25 per session = £25 x 10 sessions =	£250.00
Initial cost Monopoly = 5 sets @ £10.00	= £ 50.00
Term charge for refreshments = £1 per person	= £ 20.00
Total Cost for first term	= £320.00
Cost per member first term - £320/20	= £ 16.00
Cost per member subsequent terms - £270/20	= £ 13.50
First term Hall Hire to Treasurer = £250	

## Records Subs Received

Keeping with the Monopoly Group example, the Coordinator records receipts from members on a Payment Log.

			
PAYMENTS LOG			
Activity		MONOPOLY	
Term	SPRING 2021	Dates	4 <sup>TH</sup> JAN – 26 <sup>TH</sup> MARCH
Term Fee £	16.00	Coordinator	JOE BLOGGS
Name	Memb. No.	Fee Paid	Cash/Chq
Ann Apple	2500	£16.00	Chq
Barry Bean	2510	£16.00	Chq
Joe Bloggs	2520	£16.00	Chq
Claude Cabbage	2530	£16.00	Cash
Dennis Date	2540	£16.00	Cash
Eric Endive	2550	£16.00	Cash
Fred Fir	2560	£16.00	Cash
Gerty Grape	2570	£16.00	Cash
Henry Happle	2580	£16.00	Cash
Ian Ice-cream	2590	£16.00	Cash
Jan Juice	2600	£16.00	Cash
Kate Kale	2610	£16.00	Cash
Les Lemon	2620	£16.00	Cash
Mitch Mango	2630	£16.00	Chq
Nick Nanna	2640	£16.00	Chq
Olive Olive	2650	£16.00	Chq
Pam Potato	2660	£16.00	Chq
Roger Raspberry	2670	£16.00	Chq
Sam Satsuma	2680	£16.00	Cash
Trevor Tomato	2690	£16.00	Cash
<b>SUB TOTAL</b>		£320.00	
<b>RETAINED BY COORDINATOR</b>		£70.00	
<b>TOTAL TO RECEIPTS FORM</b>		£250.00	
<b>SIGNED</b>	<i>Joe Bloggs.....</i>	<b>DATE</b>	30.1.21.....

Each member's payment is recorded against their name and membership number showing the fee paid and whether paid by cash or cheque. The fees are totalled. The Coordinator signs and dates the form.

Please remember that cheques must be made payable to Saffron Walden u3a.

The example shows that a total of £320.00 was collected. £70.00 is being retained by the Coordinator to pay for Monopoly sets and refreshments. The balance of £250.00 (representing the Hall Hire charge) is to be transferred to the Treasurer, who will settle the bill with the venue.

In order to maintain a proper audit trail, the Coordinator must keep a simple record of monies retained and spent.

## Coordinator Transfers Money to Treasurer

Money transferred to the Treasurer is recorded on a Receipts Form.

Activity		MONOPOLY		Date		30 <sup>TH</sup> JAN 2021	
<b>RECEIPTS</b>							
Receipt Details				Amount			
Monopoly Group hall hire Spring 2021 term				£250.00			
10 weeks @ £25.00 per week							
Total				£250.00			
CASH AND CHEQUES							
Cheques				Cash £			
No of cheques	@ Value	£		£50			
8	£16.00	£128.00		£20			
				£10	40.00		
				£5	70.00		
				£2	5.00		
				£1	6.00		
				50p	1.00		
				20p			
				Silver			
				Bronze			
				Total Cash	122.00		
				Total cheques	128.00		
Total		£128.00		<b>TOTAL</b>	<b>250.00</b>		
BANK PAYING-IN SLIP						<b>£250.00</b>	
RECEIVED FROM (COORDINATOR)..... <i>Joe Bloggs</i> .....							
RECEIVED BY (TREASURER)..... <i>S. Flint</i> .....							
BANKED.....							

This form records the reason for the receipts and provides a simple breakdown of the monies transferred, totalling cheques and cash separately to make the grand total.

The Coordinator signs the Receipts form and hands it with the Payments Log to the Treasurer. The Treasurer checks and signs the Receipt Form as correct and arranges the banking.

If the Treasurer finds one or both forms incorrect, the Coordinator will be contacted promptly to correct the error(s) and possibly re-submit fresh paperwork if necessary.

**Note: The Treasurer will always be willing to offer help or advice to a Coordinator in any case of doubt relating to financial issues.**

## Payment Request

Groups will sometimes have justifiable expenses which need authorising and paying by the Treasurer. A copy of the Expenses Policy for Committee and all Groups is available via the Coordinators only pages on our website. If there is any doubt Coordinators must ask the advice of the Treasurer. Regular charges incurred by groups include items like the cost of speakers, the cost of coaches for outings, hall hire fees, etc

	
<b>PAYMENT REQUEST</b>	
DATE 10.1.21.....	
Expense Details	Amount
Cost of speaker for Debating Group on Thursday 16 <sup>th</sup> January 2021 Including speaker's travelling expenses	£135.00
Total	£135.00
Number of Invoice(s) and/or Receipt(s) attached	One
Details of Payee Mr J. Talkalot, 15, Boring Road, Neverstop	
Requested by..... Debbie Atting.....	
Signed..... <i>Debbie Atting</i> .....	
Cheque No .....	



Please make sure that Payment Requests, particularly those for outside speakers and coach hire, are submitted for authority in good time before the event. Remember that as cheques require signing by more than one Committee member it may not be possible to produce a cheque immediately.

The Treasurer may be able to make payment by BACS. Where this is possible, the Coordinator must provide the Treasurer with the correct account name, account number and bank sorting code of the payee accompanied by the correctly completed documents.

Please note that there is currently no facility for anyone to pay money to Saffron Walden u3a via BACS.

## **Other essential Information for Coordinators**

### **Data Protection**

Under the General Data Protection Regulation, Saffron Walden u3a, like all charities and businesses, must ensure that personal data it holds is properly gathered and used only for the specific purposes it was provided.

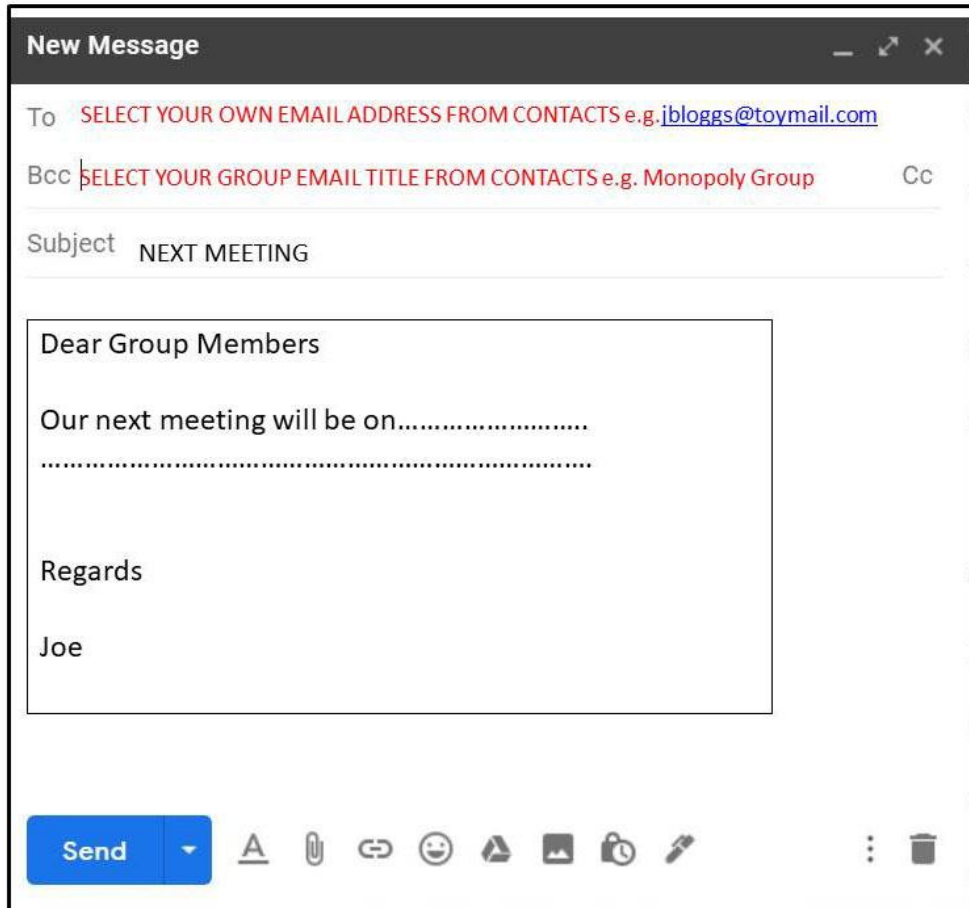
In the same way Coordinators must ensure that information given to them by group members (e.g. telephone numbers and email addresses) is properly used. The normal way in which you will be involved is in the way you email information to your group.

*When you email your group you must not show any individual's email address as this will make their email address available on the web to the world!*

There are three easy steps to avoid falling into that trap:

1. In your email Contacts create a 'Group' to contain the addresses of all your members and give the 'Group' a name e.g. Monopoly.
2. When sending a message to the group type your own email address in the 'TO' space.
3. Click on the blind copy abbreviation 'bcc' and select the Contact Group you have constructed e.g. Monopoly in your Contacts list.

When you hit the 'Send' button you will receive a copy of the message you have just sent and each individual will receive the message but will not see a list of the other group members. See the illustration below.



### **Paid Tutors**

The Basic principles of the u3a Movement are based on “Self Help Groups where all members are both Tutors and Students“. Consequently nobody in the Group receives remuneration for sharing their knowledge and experience.

However in the Saffron Walden u3a we have allowed some of our Groups to use “Paid Tutors” to carry out very ”Specific Activities” (e.g. Pilates, Keep Fit, Choir etc.) The committee has received further guidance on how to manage these “Specific Activities “correctly.

No paid tutor can be engaged without the specific authority of the Committee.

### **U3A Insurance**

The Third Age Trust provides a range of insurance cover for Trustees, Officers and members of Saffron Walden u3a. Details of the various policies and their specific cover are held by the Secretary and Treasurer, who will be able to help you should the need arise.

A summary of the policies can be found on our web site under ‘Publications’.

## **Leading a Group Using Hired Accommodation**

The Coordinator must advise the Activities Organiser, the Committee Member responsible for booking the venue, of the dates for each session. The coordinator should not arrange this direct with the venue, the contract is between the venue and Saffron Walden u3a.

The Coordinator should be aware of the layout and facilities provided at the venue and, in conjunction with the Activities Organiser, carry out a risk assessment to highlight any potential hazards, which should be communicated to the group members and the venue owner.

Check that everything is in order before beginning each session and ensure that everything is in place at the end.

If you are a key holder it is particularly important that when vacating the building everything is safe, secure and tidy in line with the venue requirements.

At the start of each meeting the Coordinator must inform members how to exit the building safely in case of an emergency and where the congregation location point is situated. The register must then be checked to ensure everyone is accounted for.

## **Groups Held in a Member's House**

The size of these groups will be limited according to the size of the residence and the wishes of the homeowner but a suggested maximum group size is ten.

Members should be made aware of exits from the house in case of emergency and the need to treat the home with respect.

Coordinators running these groups will have no rent charges to calculate but must adhere to all other administrative guidelines (e.g. group registers etc.).

## **Copyright**

The Third Age Trust holds a licence to copy some materials for educational use within groups. If you are going to be using copyright material in any form, for example, printed, audio or pictures, please refer to the information sheet Copyright/Licences on our Saffron Walden web site.

## **Problem Solving**

Sometimes issues can arise within a group that disrupt the smooth running and spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to your Activities Organiser or a Committee member if you are unsure how to resolve the problem or just want someone with whom to explore options.

## **Accidents**

Report all accidents and incidents to your Committee as soon as possible and complete an accident form. A template form is available on the Saffron Walden website. It is as well to have an accurate record in case of future problems relating to the incident. Remember that the Third Age Trust provides insurance for group activities but not personal accident insurance.

If the incident occurs in hired accommodation, record it in the venue Accident Book.

## **Who Do I Contact For Advice?**

Help is available from any Committee member but your first point of contact should always be the Saffron Walden u3a Activities Organiser. The Activities Organiser will deal directly with your question or seek further advice from another Committee member or from The Third Age Trust.

Do not forget that there is plenty of information available in our magazine 'Update', on the Saffron Walden u3a web site ([www.saffronwaldenu3a.org.uk](http://www.saffronwaldenu3a.org.uk)) and on the Third Age Trust web site ([www.u3a.org.uk](http://www.u3a.org.uk)).

## **Coordinators Meetings**

Coordinators meetings will be held from time to time. These are important for coordinating all our activities and supporting one another in developing group activities. Please do attend them even if you feel that you are "an old hand". You will definitely be able to help others if you have a lot of experience

**Don't suffer in silence! You are not alone!!**