



GUIDELINES FOR GROUP COORDINATORS

OVERVIEW

- A. Groups are the core activity of U3A, so take every opportunity to help members join and enjoy belonging to groups.
- B. Assist conveners to actively support existing groups and to start new groups where appropriate.
- C. Underpinning this support, is clear record keeping, good publicity, and resolving any difficulties to ensure the groups and U3A operate in unison.
- D. At the beginning of each year a calendar of events is provided for the coordinators to assist with their planning.

1. SUPPORTING EXISTING GROUPS

1.1 Promoting and publishing group membership

- a. Encourage individual groups to send articles of interest to the Newsletter Editor for publication.
- b. For groups with vacancies record this in your monthly report

1.2 Attendance and record sheets

- a. Ensure that all convenors have a copy of the 'Convenor's Guidelines'
- b. Provide convenors with attendance sheets and any other documents when required.
- c. Ensure convenors return completed attendance sheets to you twice a year, as per U3A calendar, to be forwarded to the Membership and Groups Data Administrator for membership checking and U3A subscription payment.

2. STARTING NEW GROUPS

- a. When there is a waiting list for a group, consider initiating a new group. This can occur when an existing group is either full or because the topic is new to U3A.
- b. If starting a new group, avoid duplicating groups that have similar topics/foci as this may make an existing group short of members, unless there are geographic or meeting date/time considerations.
- c. Call the first meeting to establish the convenor, and co-convenor if the group is large, the meeting venues, days and times and the format for the meetings.
- d. Record decisions made at the first established meeting and circulate them to the attendees.
- e. Ensure details of the group are included in the Handbook and on the Website.

3. KEEPING RECORDS OF GROUP DETAILS

Maintain an up-to-date record of group members during the year

- a. All groups' names and contact details of convenors, co-convenors and tutors, venues, days and times of meetings, and any waiting lists.

- b. Notify the Membership and Groups Data Administrator of any changes to group members' details especially phone or email addresses that may occur.

4. NEEDS/PROBLEMS/CONCERNS

Work on a solution with the Convenor, drawing on the relevant experiences of other groups and Group Coordinators for support and advice. If:

- a. particular expert's skill is required, access the Skills Register.
- b. The group has equipment needs, refer to the Equipment Manager.
- c. A venue does not meet a group's needs, assist the convenor by looking for alternative venues.
- d. A group becomes unviable, discuss this with the President, who along with the Executive will decide if the group goes into recess or is closed.

5. INTEGRATING GROUP ACTIVITIES WITH U3A MANAGEMENT

5.1 Executive

- a. Request a report from your convenors two weeks before an executive meeting. Collate the information and write your report ready to be sent to the Coordinator, as indicated by the calendar, who will present the combined report at the next Executive and following monthly meeting.
- b. Present the Executive with any convenors' grant applications.
- c. Ensure that any Executive decisions relevant to groups are implemented.

5.2 Conveners Meetings

Facilitate convenors' meetings along with the Executive members twice a year as per U3A calendar.

At the meeting:

- a. Discuss U3A matters relevant to the operation of groups.
- b. Enable conveners to share ideas and concerns on the operation of groups.

After the meeting:

- a. Ensure minutes of the meeting are sent to the conveners and presented at the Executive meeting
- b. Bring any matters which have strategy or policy implications to the Executive's attention

5.3 New members meetings

- a. Along with the Executive, arrange the new members' meetings twice a year, as per U3A calendar, to welcome members and explain how the U3A operates.

6. DELEGATION OF TASKS

With the approval of the Executive, delegate any of the above tasks to a co-convenor.

7. VENUE HIRE AGREEMENTS

Prior to the end of the year, send an email to the convenors of those groups that hire

premises reminding them to undertake the following:

- a. Obtain a new hire contract for the subsequent year from the hiring organisation and check carefully the Terms and Conditions. Note any changes that have been updated in the contract and make the Coordinator aware of these.
- b. Sign the new premises hiring contract, along with the U3A Convenor's Hire Premises Acknowledgement' document.
- c. Return the original signed premises contract to the hiring company. Keep a copy for yourself.
- d. Forward a copy of both documents to the Coordinator, who will pass them on to the President for final signing and to be kept on record by the Secretary.

8. GROUP FINANCES (conveners are responsible however Coordinators should reinforce it.)

- a. Money collected from groups for venue and/or tutor hire must be held in a U3A suspense account established through the Treasurer. This is to provide accountability and personal liability protection for the convenor, its members, and the U3A.
- b. A *koha* can be asked to pay for refreshments and invited speaker costs.

9. HEALTH & SAFETY GUIDELINES

- a. Ensure that convenors of groups who facilitate outdoor activities receive individual or small group training as per the Health & Safety Policy and Procedure document.

10. MONITORING THESE GUIDELINES

- a. Ensure these guidelines are reviewed at the designated time, as stated below.

Signed: President _____ **Gail Moore**

Date of Adoption November 2025

Next review 2027

An addition to the guidelines as at May 1st, 2026

As we no longer have an Almoner role, we ask that in the event of serious illness, the death of a group member or close member's family we would like a sympathy or condolence card to be sent out on behalf of U3A Tauranga. To do this **Convenors** need to inform their **Coordinator** for this process to happen. In some cases, individual groups may choose, which is fine, to do something special in addition to a message going out from our wider membership.

President: Bev Edlin

Date: 12/06/2026