

SU3A Guidance sheet - Being a coordinator

Key role is to **organise** your group and to act as **contact** between your group and SU3A Committee

Appoint if possible a **DEPUTY COORDINATOR**

Appoint, if you are not on email, an “**internet buddy**” to maintain efficient electronic records and contact for your group

Attend in person or by proxy the annual **Spring Meeting for Coordinators**

In February/ March send to Database Manager the **annual update of information** about your group(s)

In March send to the General Coordinator the **Membership Roll** (Name and up-to-date SU3A Membership Number only) for your Group(s)

A Membership Roll should reveal a member’s **contact details** only where that member has given **permission** for the details to be shared

Communications amongst Group members should never reveal any members’ addresses unless with their permission (when **emailing** use the “**Bcc**” or “**blind copy**” option)

Describe fully on website and in LINKS the **requirements for membership** and for **adequate participation** in your group’s activities

Keep a **Register** of members’ attendances at meetings

Keep General Coordinator informed of **Vacancies** and of **Deaths** (Membership Records Officer) in your Group

When your Group is **FULL** tell potential joiners or enquirers to register with the General Coordinator (so that a **Waiting List** may be identified)

If a seemingly **insoluble problem** arises in your group contact the General Coordinator

In the event of an **incident/accident** seek professional medical help if necessary – there are no formal requirements for First Aid or First Aiders in a Group

If an **incident/accident** occurs, fill in and send to the **SU3A Secretary** an **Incident Form**

Whenever your Group is using any venue ensure that you know the **venue’s POSTCODE** for use in informing **rescue/emergency** services

For **INSURANCE** and **FINANCIAL** matters see pages 2 and 3.

Pay frequent visits to **LINKS backpage** and **SU3A website (Group Coordinators’ page)** and if you need supplementary information contact the General Coordinator or a Committee member

SHEFFIELD U3A

Groups' finances

As a coordinator you have responsibility for the finances of your group whether or not one of your members acts as treasurer.

In fulfilling this responsibility your guiding principle should be to ensure that all moneys due to your group are collected, that all expenditure can be verified as being spent on behalf of the group and that the group's moneys are never mixed with those of any individual.

To help achieve these principles the main dos and don'ts are listed below.

Do

Only spend money on the group's objectives.

Obtain receipts/vouchers for all expenditure, where ever possible on printed letterhead.

Ensure that any bank account includes "U3A" in its name.

Ensure that any bank account needs at least 2 signatures to operate it. Signatories should not be spouses/partners or relations.

Keep a record of all cash received.

If a speaker asks you to give his/her fee to a charity, get the request in writing.

If you raise money for a charity ensure that the charity's name is made clear to all participating and that the funds raised are passed directly to the charity without going through the group's U3A bank account.

If your group has income or expenditure of £1,000 pa or more have your accounts audited. (Audit certificate is on the SU3A website or obtainable from the treasurer).

Do not

Put any U3A money into a member's private bank account.

Keep more than £100 in a member's house.

Give U3A funds to another charity. (Other than speakers' fees – see above).

Pay money raised for another charity into a U3A bank account.

Pay any U3A member (including members of other U3As) for services rendered – eg speaking, tuition.

Enter into any long term (12 months or more) financial commitment, except with the express written permission of the Executive Committee.

Insurance

The Third Age Trust organizes public and products liability, money and all risks insurance on behalf of all U3As. The money and all risks cover are only for U3A money and property.

Members are not covered under the U3A insurance cover for personal accident and injury or for loss of or damage to their own property.

A few dos and don'ts to ensure that you meet the requirements of the insurers.

Do

Check that all your participants are current U3A members. (Carers accompanying a U3A member need not be members)

Keep a register of visitors

Report any incidents on the incident report form.

Do not

Allow prospective U3A members or visitors to attend more than twice; this will nullify your group's insurance cover.

Finally

If in any doubt consult the coordinators' page on the SU3A website or contact the treasurer (contact details in Links and on the website).