

Report on Group Leaders' Workshop held on Wednesday 2nd November 2022

The Workshop was attended by 26 Group Leaders (GLs) and all 10 Committee Members (6 of whom are GLs). Refreshments and a buffet lunch were served by several STARS volunteers.

After a welcome and introduction from all Trustees, the following topics were covered:
Groups, Finance, Magazine and Discussion.

GROUPS - led by Louise Elsome, HWu3a Group Coordinator

- **Update** - HWu3a began in January 2022 with 70 groups; 11 new groups have started up during the year and, although we have lost a few, we will end the year with 80 groups in total.
- **'Harborough Welland Get Together' meetings** - they have had a very positive impact on stimulating new groups and promoting existing ones, as well as informing new members and providing a regular social event. All Trustees try to attend these meetings as often as possible as they give us an opportunity to find out what our members want and expect from HWu3a.
- **The Group Leaders' Handbook** - available on the website and updated regularly. A recent update related to GLs only using their own device, never a public computer, for sending emails to group members. GLs were reminded to only use Beacon to send group emails, not their personal email address.
- **Generic emails for GLs** - if you wish to use a generic email, e.g. architecture@hwu3a.org.uk please contact Stephen Joy website@hwu3a.org.uk who will set this up for you. This allows for ease of transfer if a GL changes, as well as security.
- **Waiting Lists** - rather than inform a member that your group is full, please let them know that there is a waiting list which may develop into a second similar group. The Group Coordinator, who has an overview of all the groups on Beacon, can see where the possibilities of a further group are. Please update your group lists on Beacon regularly so that they are a true reflection of your active group members.
- **Videos of Groups** - Jack Horton marketing@hwu3a.org.uk asked GLs to video their groups 'in action' as we want to put together a video which represents HWu3a for meetings, events and on the website. Further details in the November magazine.

FINANCE - led by Andrew West, HWu3a Treasurer

- **Annual Financial Returns (AFR)** - To ensure transparency and consistency for all financial transactions carried out by HWu3a groups, AW will introduce this method of recording. (Sample forms were available for GLs to look at). At present, the Treasurer has an overview of only some groups' financial transactions and, having consulted 2 other u3as, Charnwood and Rutland, it is clear that our current system is not sufficient for accurate accounting. AW concluded that use of the AFR was the best system for

2022, bearing in mind a new committee will be in place in the next few months and banking matters should be in place by then. It will be reviewed for 2023 and may go forward with a better process. It's possible that a 6 month reporting system may be preferable. Individual group queries were dealt with, e.g. Local History, which runs trips and incurs venue fees, therefore requiring a separate AFR for each activity. Groups with no financial transactions need only return a signed blank AFR showing no income or expenditure. In February AW will bring all annual accounts together and have them independently examined, to be sent out to members before the AGM in March.

Regarding the introduction of the AFR, the following points were raised:

- ❖ Concern was expressed that this would be an onerous task for GLs, some of whom run more than one group, and who were 'not in the role to run financial accounts'. One GL did not see the need for two reporting methods. AW responded by saying that GLs take on the role with certain expectations, as he has, as Treasurer. AW noted that, as things stand at present, there are some groups for which no income is visible, even though money has been paid to GLs by members for activities.
 - ❖ AW noted that if someone paid in money to their own account to pay for a group expense, there is no record for others to see. Furthermore, if something happened resulting in that person being unable to access their account holding u3a funds, there would be no evidence trail. Stuart Irons premises@hwu3a.org.uk noted that, an example of this would be when excess money is collected in over a period of time by a GL, e.g. for a Christmas meal. If we don't know about it, the accounts do not reflect the actual situation.
 - ❖ One GL noted that it would be better if everyone followed the same procedure. AW acknowledged all venues and activities are different. The form would ensure a consistent approach.
 - ❖ HWu3a Chair, Helen Salisbury (HS), stated that AW has the full support of the Committee and that, as Trustees, we are responsible for ensuring that members know how our organisation uses their money.
 - ❖ Another GL supported the legal requirement for the need to be financially transparent and felt that it had been a useful discussion.
- **Payment of Venues** - Any notifications of changes to venue costs will be passed on by SI to the groups concerned so that GLs and members have prior warning. SI checks payments to him against invoices received, which can be tricky as some rents are collected yearly and some monthly, and groups may pay at different times. Groups need to be mindful of meeting cancellations, whether advised in advance to the venue or not; sometimes credits are needed in these situations. SI advised that some venues are strict regarding early arrival/late leaving times and will charge extra if the agreed time slot is not adhered to.

MAGAZINE - led by Dave Martin and Jack Horton, HWu3a Magazine Editorial Team

- **Changes to Magazine** – The change of name is a reflection of the desire to create a more interesting read. The printed version will contain various articles, not all u3a related, but usually local and informative. JH confirmed that the magazine promotes HWu3a to the community. Group reports will appear in the online version where space is unlimited and more photos can be included. We are starting to use links to outside sites, as well as our own website, where more info can be gleaned.
The editorial team is aware of some glitches with articles having been sent in but then ‘falling through the cracks’, which can happen with two editors. They hope to eradicate this with a more rigorous approach to recording all received contributions and also using a third person to cross-check their collection with the final publication.
- **Monthly Group Focus** - They will continue to focus monthly on different types of activity groups to showcase what they do and to help them attract new members. This can be a joint effort by group members, not necessarily the GL.
- **Content and Copyright** - Please confirm to the editorial team that any photos submitted to the website are copyright free so that they can be used in an article or as the link to the website. All contributions should be sent to newsletter@hwu3a.org.uk as Dave and Jack both share this email address. Please do not send articles to Dave or Jack’s other u3a email addresses.

DISCUSSION ACTIVITY FOR GLs - Although HWu3a has launched a healthy number of new groups in 2022, there have also been groups which, despite initial enthusiasm and sufficient numbers, have not successfully taken off. The reason for this will come as no surprise - reluctance to take on the GL role! The GLs were given some time to discuss some aspects of this perennial problem and, although we ran out of time to feedback ideas, here are some of the points and suggestions made:

- ❖ **What is the role of a GL?** - to be an enabler - to ensure that every member has a chance to contribute with confidence - to welcome and communicate, especially new members - to ensure the smooth running of the group - to encourage members to participate in the running of the group - to ensure a collective approach - to collect money - to keep records - to organise an agenda - to show enthusiasm - to lead sessions - to delegate
- ❖ **What barriers are there to members taking on GL responsibility?** - dealing with finances and admin. tasks - not confident in IT skills/Beacon - expectation to lead every session - similar groups may cause confusion/extra work - regular commitment/time - taking responsibility - health and safety issues - lack of support from members who are unwilling to share responsibilities - lack of confidence - lack of awareness as to what’s involved
- ❖ **How can HWu3a further support prospective GLs?** - initial support with financial matters - IT support with Beacon - use National Adviser (list published in TAM magazine) - ‘Buddy’ scheme for new GLs for first 3 months - emphasise to members, new ones in particular, the ethos of shared learning - having joint GLs/co-leaders/leadership team - equipment support at meetings - put shared learning into practice with members taking turns to present/lead/organise -

encourage members to inform GLs re attendance - mentoring/Committee support and liaising with other GLs - change the word 'Leader'

Lots of great ideas and it's good to know that many of them are already in place - and in the 'Group Leaders' Handbook'. One change for 2023 will be the name '**Group Leader**' which will become '**Group Coordinator**' and the current '**Group Coordinator**' title will be '**Group Facilitator**', as we feel they are more accurate descriptions of the roles.

OTHER TOPICS RAISED (some of which were brought up one-to-one):

- **Beacon emails** - for Data Protection reasons all emails from GLs to group members should be sent via Beacon and generic emails for groups are encouraged.
- **Magazine** - group information only published in the online version may not reach prospective members, e.g. Coffee Hub and potential computer users. The decision-making process for printed and electronic versions was explained. Many reports sent in by groups, e.g. walking groups, is only relevant and of interest to those group members and, therefore, appears in the electronic version. This has a positive impact on the cost of printing the magazine and also uses far less paper.
- It was suggested that flyers with **Activity Group Listings** could go inside magazines left in local libraries and other public places.
- LE confirmed that the **Groups' Noticeboard** appears in the printed version, to which she submits each month and to which GLs are encouraged to contribute, e.g. to publicise a special event or if a group is seeking new members.
- Dave Martin confirmed he is now the new **Speaker Coordinator**. Any suggestions from members about potential talks to be passed to him, email speakers@hwu3a.org.uk
- **Publication of GLs' personal phone nos. and emails** - as this has caused a problem recently, it will be raised at the November Committee Meeting. As part of GL induction, permission will be sought before personal contact details are shared on the website or in the Group Listing, and the 'Group Leaders' Handbook' will be amended accordingly. HS will amend Trustee Induction similarly.