

Universities of the Third Age in the United Kingdom

The Aims and Guiding Principles of the U3A movement have been updated in a more reader friendly style whilst preserving Peter Laslett's original ideas.

AIMS

PREAMBLE

The Universities of the Third Age (U3As) in the United Kingdom are autonomous, self-help organisations run by the voluntary efforts of their members. All U3As are members of the Third Age Trust (a Registered Charity) that is their national support and advisory body. The word 'university' is used in its original sense of people coming together to share and pursue learning in all its forms. U3As have the following aims and guiding principles:

AIMS

1. To encourage and enable older people no longer in full-time paid employment to help each other to share their knowledge, skills, interests and experience.
2. To demonstrate the benefits and enjoyment to be gained, and the new horizons to be discovered in continuing to learn throughout life.
3. To celebrate the capabilities and potential of older people, and their value to society.
4. To make U3As accessible to all older people.
5. To encourage the establishment of U3As in every part of the country where conditions are suitable, and to support and collaborate with them.

GUIDING PRINCIPLES

U3As are guided by the following principles:

1. PROGRAMMES

1. U3As offer learning activities that reflect members' wishes and which aim to satisfy the widest possible range of interests: educational, cultural, recreational, physical and social.
2. U3As seek resources appropriate to their learning; from their own memberships; from the Trust's national support systems; and from outside organisations, both local and national.
3. U3As make use of new technologies as they become available.

2. PURPOSE, STYLES AND METHODS OF LEARNING

1. The pleasure of learning is a driving force in the work of U3As.
2. U3As neither require nor award any qualifications.
3. By sharing their learning, U3A members help one another to develop their knowledge, skills and experience.
4. U3As arrange and support their own programmes as appropriate to their chosen learning activities.
5. U3A members regard themselves as both learners and teachers.

3. FUNDING

1. U3As are funded in the main by the subscriptions of their members. Funding from outside sources may be sought on occasions and is accepted only if there are no conditions attached which might conflict with the Trust's aims and guiding principles.
2. Members themselves undertake, without payment, the many and varied tasks necessary to run their U3A. Usually, paid tutors are engaged only when special expertise is necessary to ensure the health and safety of members taking part in certain activities, and when U3As do not have an appropriately qualified member available.

4. REACHING OUT

1. U3As take every opportunity to promote the benefits of learning later in life and the attractions and advantages of the U3A way of learning. They make membership available to the whole spectrum of older people in their communities.
2. U3As keep in touch with members and former members, who for a variety of reasons can no longer take part fully in U3A activities; in order to maintain their interest in learning and to offer friendly support, a fundamental part of U3A life.
3. As appropriate, U3As offer voluntary assistance in learning activities to educational and cultural bodies in their communities.
4. U3As collaborate with institutions such as museums, galleries, and libraries, in learning partnerships in which both U3As and the institutions themselves may benefit through research, advancement of knowledge and mutual respect for capabilities.
5. U3As engage with local and national government departments and other agencies that formulate lifelong learning policies and practices in order to influence those that relate particularly to learning in later life.
6. U3As are ready to collaborate with institutions undertaking research into ageing and the position of older people in society.

5. ASSOCIATION

U3As collaborate with each other to share expertise and facilities and offer systems of support. They may form themselves into regions or neighbourhood associations. U3As work, individually or together, to establish and support new U3As.

Monmouth U3A aims to support and enhance the interests of members

6. ACTIVITIES

Members of the group can set any activity up where several members show an interest, providing it is legal, does not involve excessive outlay, and someone is prepared to convene and lead the group.

ROLE OF THE CONVENOR

- ensure that all participants are members although non members can attend for 'taster' sessions prior to committing to membership. Ask your members to provide contact details.
- guide the Group through the chosen programme.
- co-ordinate the activity programme where necessary.
- arrange a venue, with help if necessary (see page 3).
- appoint a deputy to ensure continuity where possible or practicable.
- delegate some administration, e.g. money collection, photocopying, where appropriate to the size and type of activity and group.
- maintain a register to be taken at the start of each session, and welcome new members.
- explain that members that they must notify Convenors when unable to attend. Membership is a commitment.
- tell the Convenor about any change to arrangements; e.g. Convenor, venue, times.
- consult with the Committee before asking a member to leave the Group.
- refer to the Committee any other problems which may arise.

7. DIFFERENT TYPES OF GROUPS

Convenor-led Groups The group plans/organises the programme of activities with the Convenor acting as a co-ordinator, e.g. Reading, Walking.

Enthusiasts' Groups can have a Convenor and rotating Tutors. These groups arise from a

common interest (e.g. Books, Bridge, Computing) where members encourage, support and/or learn from each other. The Convenor chairs the Group. Group members, according to the topic, can undertake the Tutor role.

Shared Convenor Groups

This is where two or more members share the role of convenor. Each should have clearly defined responsibilities, e.g. Local History, Genealogy.

Paid Qualified Tutor Groups

Where a fully qualified tutor is a necessity – such as in the interests of Health and Safety – and who is paid for their time e.g. Yoga or Foreign Languages, where the Convenor has no expertise in the subject matter.

8. ROLE OF A MONMOUTH U3A GROUP CO-ORDINATOR

The Group Co-ordinator is the main support and source of information for Monmouth U3A Group Convenors. The role involves:

- being aware of meeting dates and times; membership and waiting lists; dates of trips or other one-off events.
- compiling a waiting list to anticipate the need for initiating new Groups.
- helping to form new Groups.
- helping Convenors to develop links with other U3As which have Groups with similar interests.
- checking that all Group members are paid up members of Monmouth U3A.

For advice on other specific matters, contact The Secretary or Treasurer.

Experience has shown that the more successful groups are structured and carefully programmed.

9. VENUES

In the Convenor's or a members home, and other suitable venues. Consider accessibility/finance. Local possibilities include Bridges Community Centre, Rockfield Community Centre, Mitchel Troy Village Hall and Buckholt Village Hall.

10. TIMES AND FREQUENCY

This should be organised/agreed amongst the group and with the Convenor.

As we continue to grow, avoiding clashes becomes more of a problem and you may need to ask for assistance from the Group Co-ordinator.

11. AWARENESS OF PEOPLE'S NEEDS

Remember that people have different degrees of mobility, hearing, sight, dexterity, etc. Consideration must be given to such difficulties without causing embarrassment to the member.

12. GROUND RULES

Ensure that the size of the group is appropriate to the subject. Ensure that consideration is afforded to each other (e.g. speaking, listening, no smoking rules, offering lifts, making new members welcome etc.

13. GROUP SUPPORT

- Is your Group full? Could you encourage a member of your Group to start a further Group?
- Are you having problems with a venue? Is it too small? Is it in the right area for your Group?
- Are you having a problem with a member of the Group, and are you unsure how to handle the situation?

The Monmouth U3A Group Co-ordinator will be glad to help with these or other problems.

14. CONVENORS' HANDLING OF FINANCES

Every Interest Group must be self-financing. But it is not the responsibility of the Convenor to finance the venue or activities; nor does Monmouth U3A pay for the hire of rooms from central funds. Costs are shared among members. See below, how Convenors manage group funds.

Golden Rules:

- **Never** use your Bank Accounts or Cards for U3A Monies.
- **Never** hold more than £250 in cash at home - our insurance limit is £300.00.
- **Always** keep a record of receipts and payments. The Trustees (Main Committee Members) will require an annual statement of turnover in order to fulfil their obligation to report to the Charity Commissioners. *See below.*
- Only bank money in the Monmouth U3A 'Activities Account' set up by the trustees for your benefit. Only trustees can hold accounts in the name of Monmouth U3A.

Reporting:

The main Treasurer will send out in June a Return Form to those groups who use the Monmouth U3A Activities account requesting you to simply declare your turnover for the last year, ie: September to August, together with starting and finishing balances.

How the money is used is entirely up to the Convenor and members of the Group. All that needs reporting is a summary of receipts and expenditure.

Banking:

- Your Committee has set up a specific account, a Lloyds —Monmouth U3A Activities Account, for holding all Group Monies that need to be 'stored' or collected and paid to a third party.
- The Account is administered by the Treasurer and is so arranged that each Group's balances can be reported separately.
- The treasurer provides Convenors with wishing to use the system normal paying-in slips and you can request Cheques or BACS payments. The system ensures that:
- The Trustees supervise all significant U3A Monies.
- Any unexpected change in Convenor's circumstances does not 'freeze' the funds.
- When Convenors change there is no interruption in the finances.

You are strongly advised to use this facility for your own protection and convenience.

HELP If you have doubt about any of this, please ask the Treasurer.

15. PHONOGRAPHIC PERFORMANCE & COPYRIGHT LICENCES

The Third Age Trust has a licence to enable us to play recorded music in public. Country Dancing, Recorders, Jazz & Music Appreciation are covered.

16. INSURANCES Monmouth U3A is insured for the following:

- All members are indemnified against compensation that they may be legally liable to pay following injury or property damage sustained by a 3rd party, or by member as a result of a U3A activity.
- Cover for theft of money in custody of members in transit or in members' homes. **Our limit is £1,000.00**
- Any item of equipment belonging to Monmouth U3A is covered for loss or damage, new for old, while it is in the hands of the registered keeper, in the members' car, house or other venue provided it is kept out of sight, i.e. boot of car, under lock and key and the building is securely locked when unoccupied.

We are not insured for Personal accident:

- **Please remember that all members, when taking part in U3A activities, do so at their own risk and the U3A does not insure them against personal accident.**
- Tutors or specialists who are paid for regular group activities, e.g. yoga]. They are required to have up-to-date tax and insurance arrangements in place and details must be handed to the Committee each year.

For further information on the above or any other insurance please contact the Secretary.

17. CAR-SHARING

Shared transport is to be encouraged, and costs incurred should be shared equitably. With the price of fuel having increased, the Committee's advice is that a contribution of **30p per mile** – plus expenses such as parking and Bridge tolls – should be divided equally between the car's occupants for journeys made. A prior calculation producing a rounded figure can avoid problems over change. Provided that there is no element of 'hire or reward' involved, there should not be any difficulty over insurance cover.

18. COMMUNICATIONS AND RESOURCES

1. **Monmouth U3A Monthly Bulletin**, contains up to date information for members. It is essential that all Convenors notify the Editor of our Bulletin of any item they wish included, **by the deadline of the 10th of the month before the following month's edition.**
2. Our website: www.monmouthu3a.com aims to give up-to-date information to members. Convenors can use the **Contact Us Form** on the website to add and edit items for their own specific groups and Convenors should ensure that information is kept up to date.
3. **Monmouth U3A Magazine** is published twice a year and posted to members. As well as news from the groups it contains articles and original contributions from individual members. It is intended to reflect the wide variety of interest and expertise within our membership and everyone is encouraged to contribute.
4. **The Resource Centre** of the 3rd Age Trust holds learning resources for use by local U3As.
5. Contact the Resource Centre: 020 83150199 resource.centre@u3a.org.uk for materials.
6. **The National Office** has various Start Up leaflets to help in setting up and running group activities: 020 8466 6139 national.office@u3a.org.uk
7. **National Network Co-ordinators** who are volunteers from U3As, run courses and circulate Newsletters nationally. They are a most useful source of support and encouragement for Convenors. See Web site for details: www.u3a.org.uk
8. U3A 'Third Age Matters' and 'Sources' are available from the National website: www.u3a.org.uk Access to the National website 'members only' section requires a password, and you register by following the straightforward instructions on their web site.
9. **On-line courses.** Refer to the website for details of courses that are available. If the Convenor cannot access the website, ask the Group for assistance. Library Internet is free.

18. MONMOUTH U3A EQUIPMENT - MONMOUTH U3A USE ONLY

Slide Projector, Video/DVD Player, Overhead Projector, Large Screen, Projector Stand, Digital Camera. If you wish to borrow any of these items, please contact the Groups' Convenor, Chairman or Secretary.

Please ensure that all faults are reported immediately.

Thank you to all Convenors for the hard work and enthusiasm that you put in to help make Monmouth U3A a success.

Monmouth U3A acknowledges with gratitude the considerable help that Pembrokeshire U3A's Convenors' booklet provided in framing this advice.