

'INTEREST GROUPS MATTER WORKSHOP'

HELD NOVEMBER 26th 2024 – LEEDS

The workshop was opened by Angie Grain and Pat Collard. Margaret Fiddes apologised for not being able to attend. There were forty seven delegates from twenty four u3as.

WHY OUR INTEREST GROUPS MATTER FOR THE OVERALL HEALTH OF OUR u3as – Pat Collard

Key points:

- a) We would not exist without interest groups.
- b) Some members join just for a particular interest group.
- c) Different u3as organise differently, for example based on size, and this is good.
- d) The age profile of a u3a may affect the groups on offer.
- e) The TAT website contains a wealth of advice and guidance and can be adapted to fit your u3a's needs.
- f) The term leader may be off-putting; the workshop will look at what this actually means and how the role might be broken down and/or supported.
- g) Every leader should have a copy of the incident report form to hand.

u3a Health Check

If you divide the total number of members by the number of your groups – is the ratio of your number of members to number of groups less than 12?

Research has shown that vibrant u3as have a ratio of one group for every ten members. If you have a higher ratio, e.g. one group for every 12 or more members, then you have fewer groups than is ideal. This is likely to lead to more groups becoming full. This is especially discouraging for new members who cannot join the groups that they'd like to.

- h) Ideally there should not be waiting lists. Getting into a particular group may be an issue but no one should not be able to get into some groups of interest.
- i) Members should be aware of Interest Groups Online (a sort of online u3a branch).

- j) Using You Tube is an option especially the subscription service (which is ad free) and a u3a might pay for that centrally for groups to use. However the You Tube and venue licencing should be investigated.
- k) Delegates had mixed experiences of national u3a subject advisors, but they are there and should be drawn on.

FINANCE – Brian Cave

Please refer to slides 11 – 22 for a summary.

- a) The general trend in a u3a, as it ages and grows, is a move from central control of finance under one treasurer to a devolved network or responsibility. It was emphasised that all funds at all levels belong to the u3a and are accountable for by that u3a.
- b) It is vital to have processes which protect members from being accused of mismanaging funds.
- c) Beacon has a finance system which can be used at Group level.
- d) It was commented that many banks are restricting the number of secondary accounts which can be 'nested' under the main u3a account.
- e) YAHR offer grants for equipment to our u3as for up to 50% of a capital purchase – up to a maximum of £250.

SOME OF THE ISSUES ABOUT ESTABLISHING NEW GROUPS – Angie Grain

*Note: different u3as use different role titles. Here a '**leader**' is the main person (or sometimes more than one) who makes an activity happen at group level; a '**coordinator**' has an overseeing role in supporting groups and fostering new groups at a u3a level, typically a Trustee/Committee post.*

DISCUSSION GROUP NOTES

1. ENCOURAGING PEOPLE TO BECOME GROUP LEADERS
 - a) Start new groups with two leaders to foster succession planning and if the group grows, this will assist splitting it into two groups to avoid waiting lists.
 - b) Drop-ins to provide visibility and central support.
 - c) Keep process simple for leaders, especially finance.

- d) Ask new members to share what their work experience is to help identify potential new leaders.

2. SHARING THE LEADERSHIP OF THE GROUP AND MAKING THE TASK MORE ATTRACTIVE, LESS ONEROUS

- a) Consider multiple leaders (two? three?) rotating the leadership functions of the group.
- b) Sharing with group members more widely the expectation that individual members have a role to play in making a group happen – almost a terms of reference at group level, specific to the group, for example maybe a walking group might expect every member to lead a walk, although do consider that some individuals may balk at some roles and be put off participating. However others may be inspired to grow into a leadership role.
- c) Providing a specialist to enhance the groups knowledge and confidence, for example, health and safety, risk assessment or a specific knowledge.
- d) Use simple language in developing group guidance.
- e) Having and understanding emergency arrangements is important.
- f) Provide mentoring for new leaders, face to face.
- g) Run workshops for potential leaders and to keep existing leaders conscientious and happy in their role. Leading should be a joy.
- h) Dedicated newsletter for leaders and encourage leaders to share experiences and advice.
- i) Maybe the u3a chair or another committee member run the first few sessions to get it started then hand over.
- j) Make it clear 'no leader =no group' and see what happens

3. SUCCESSION PLANNING AND ANTICIPATING RETIREMENT TO PREVENT GROUP CLOSURE

- a) Try to have more than one leader of a group, familiar with running the group and with access to group contacts etc.
- b) Encourage sharing of the workload across a group including shadowing.
- c) Offering help to new group leaders from overall Group Coordinator.
- d) Simplify the leader role- break it down into smaller tasks. Several or more of these tasks may, in time, accrete to an individual as they mature into the role / grow in confidence.
- e) Use the coordinator as a backup.
- f) Proactively checking with groups about potential new leaders.

- g) Keep in touch with leaders to be on top of a potential need to find a new one
- h) Provide technical support for leaders.
- i) Be aware that leaders may not be aware of or willing to admit they should really step down.

4. DO ALL GROUPS NEED EXPERTS TO LEAD THEM? IS IT A FACILITATING/ORGANISING ROLE? NOT TEACHING?

- a) Remember the u3a is 'members for members' so not all groups need experts.
- b) If a tutor or speaker is being paid it is vital the Committee/ Trustees ensure the rules around payment, reimbursing costs are followed – there is TAT advice available on this.
- c) A leader should be aware of the skills within a group (for example leading walks).

5. SUPPORTING AND ENCOURAGING OUR (NEW) GROUP LEADERS

- a) Use of newsletter to provide information.
- b) Organise venue arrangements centrally in the short term at least and longer where practical to ease the administrative workload.
- c) Provide 1 to 1 support.
- d) Run leader training sessions.
- e) Dedicated leader communication; **WhatsApp was discussed but it was pointed out it may inadvertently infringe GDPR policy and exclude members who do not want their phone number shared. A system called Groups IO is considered GDPR compliant.**

6. WAITING LISTS – CAN WE AVOID THEM? BEST WAYS TO DEAL WITH THEM? CENTRALISE OR GL MANAGED? CAN IT HELP?

- a) Understand what the specific reason is for the waiting list at group level.
- b) Change the group size limit a just see what happens!
- c) Run groups on a 'first responder' basis, i.e. 'the <whatever the maximum number is> people to respond to the notice of a meeting get a place.'
- d) Check the people on the waiting lists really know what they are waiting for – consider running taster sessions to gauge the real level of interest.
- e) Consider running occasional ad hoc activities to fill the gap for people waiting for a place.

7. CLARIFYING/SIMPLIFYING THE PROCESS OF STARTING NEW GROUPS

- a) Support: consider trouble shooter/ 'expert' help from with the u3a on the procedural and practical matters (e.g. risk assessment, safeguarding, room booking)
- b) Strike a balance between providing a new leader with essential v's too much information.
- c) Consider a buddy system / utilising networks within the u3a or between u3a at regional level.
- d) Consider clustering like-topics with a nominated support system (e.g. maybe all outdoor activities, all craft activities or all modern languages) as there may be generic themes and issues.

8. UNUSUAL AND/OR SUCCESSFUL NEW GROUPS – IDEAS? (FLIP CHART CONTRIBUTIONS)

These are the groups suggested by participants.

1. Anything But Grey (new and challenging adventures)
2. Archery
3. Autumn Of Our Lives
4. Backgammon
5. Botanical Art and Illustration
6. Crochet Post Box Toppers
7. Dog Walking
8. Drone Flying Group
9. Electric Biking
10. English Language & Linguistics
11. Feng Shui
12. Fly Fishing & Fly Tying
13. Go With (a contacts system if anyone would like a companion for an activity e.g. theatre, gallery visit – on an ad hoc basis)
14. Going Gently – Old Age and Afterwards
15. How Not to Age
16. Improvisational Theatre
17. Indoor Bowls
18. Latin Dancing
19. Latin Music
20. New Testament Greek
21. Nordic Walking
22. Paddleboarding
23. Pickleball
24. Rowing
25. Rummikub (??)

- 26. Scambusters
- 27. Walking With a Purpose
- 28. Wild Swimming

THE ROLE OF A GROUPS COORDINATOR – Lynn Maloney Groups Coordinator; Barnsley u3a)

- a) That we can try out groups without commitment is a great u3a positive and shouldn't be underestimated.
- b) Think of pop up groups – maybe seasonal. Some pop ups may unexpectedly last for years.
- c) Vary your style in how you encourage people to set up groups – direct eye contact or slowly reeling someone in.
- d) The coordinator needs to be part of a hierarchy within the organisation to sort out issues and problems, not seen a working solo.
- e) Consider establishing links to other community organisations to raise the u3a's profile and attract new members. For example we have many groups which offer physical activity which may help other organisations deliver on their objectives.
- f) The coordinator should go to new members' meetings to see what people want but also what they can offer.
- g) If a group is full, encourage members on a waiting list to look at similar groups.
- h) A coordinator is about providing support, not interfering – all leaders will do things differently and that is a strength and should be protected.
- i) A coordinator might lead a new group to ease a new leader into the role but then should step away.
- j) Recognise groups have a life span, become stale and will fold. This shouldn't be seen as a failure or that they weren't being run properly.
- k) The coordinator should ensure conversations within a group on succession planning are held.
- l) Maybe occasionally drop into groups to see how things are running.
- m) Disputes initially are focused through the coordinator role.
- n) A move of venue may revitalise a group but venue choice is a matter for the leader/group not the coordinator.
- o) Don't fear failure

YOUR ISSUES ISSUES PARTICIPANTS ASKED TO BE CONSIDERED BY DELEGATES

DISCUSSION GROUPS NOTES

1. PROVIDING INFORMATION FOR LEADERS; WEBSITE, HANDBOOK, TRAINING SESSIONS, ETC
 - a) Information provided to leaders: a local handbook; regular leaders' meetings; provide standardised documentation such as registers.
 - b) Encouraging established leaders to revisit guidance documentation and not assume they know what to do, keep them fresh and up to date with changes.
 - c) Information provided to all members: newsletters (digitally or / and paper).
 - d) At (Monthly) Members' Meetings: provide update on new groups with sign-up sheets; specific information from existing groups; a membership desk where any queries can be lodged; periodic displays by groups.
2. UPDATING GROUP INFORMATION FOR MEMBERS: WEBSITE, LEAFLETS, SOCIAL MEDIA ETC
 - a) Recognised that keeping information up to date across all platforms is a major challenge. Poll leaders on a monthly basis for any changes. You need 'lean' systems to avoid duplication of work between platforms and foster an environment where people are willing to respond to being asked for updates.
3. REGISTERS – UPDATING LISTS AND GETTING THEM TO SIGN IN AT MEETINGS – WHY?
 - a) Registers need to be held for three years to satisfy our insurers requirements
4. PUBLICISING GROUP INFO, SO FOLK AWARE WHAT'S AVAILABLE: AT MONTHLY MEETINGS, NEWSLETTERS, ANNUAL SHOWCASE ETC.
 - a) This is dealt with in other sections.

5. BUDDY SYSTEM ACROSS YAHR OF SUBJECT-BASED LEADERS

- a) This idea was supported.

6. DEALING WITH CONTENTIOUS ISSUES – WHO? HOW?

- a) Suggestion: These need to be owned by all Trustees so there is authoritative and unified action. However, consideration needs to be given to confidentiality and ensuring that in the event of escalation any formal complaints process is not compromised by all trustees already being involved in decision making.
- b) The suitability of facilities for members with physical impairments might discourage people joining a group and lead to contention: good risk assessments and clear information on venues and what the group activity entails.
- c) Be aware of cliques developing.
- d) Discussion groups involving politics etc may be a cause of contention between members. Members of these groups need to be aware they should be accepting of alternative views strongly expressed. 'What goes on in the discussion group, stays in the discussion group'.

7. BEACON – MEMBERS LEAVING/JOINING GROUPS, UNKNOWN TO GL?

- a) Beacon can be configured to prevent / permit this. (Advice from Frank Bailey; Beacon Coordinator)

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