

U3A Bendigo

***LEADERS, AND CO-
LEADERS
Handbook***

*(COVERS CONVENORS, TUTORS, TEACHERS,
TRAINERS, COORDINATORS, SUPERVISORS,
INSTRUCTORS, MANAGERS)*

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Office Hours

The U3A office is open on Tuesday and Friday mornings from 10:00 am to 12:00 pm.

Postal Address:
U3A Bendigo
PO Box 274
BENDIGO 3552

U3A Rooms
St Mary's Anglican Church
Cnr Church & Bank St, Kangaroo Flat
Enter via carpark off Church Street

Website: <https://u3abendigo.com/>

INTRODUCTION

We warmly thank you for Leading or Co-Leading your activity. This Handbook and other documents have been developed to support you.

ROLES, RESPONSIBILITIES & LEADERS/CO-LEADERS' RIGHTS

Our Leaders, instruct, or facilitate activities, while a Co-Leader where appointed, assists in managing the group by agreement, or runs the group when the Leader is absent.

Leaders and Co-Leaders are responsible for:

- Providing a description of their activity for inclusion in the U3A Membership Management System (U-MAS), the Prospectus and the BUZZ newsletter
- Organising activities within the advertised program
- Maintaining attendance records for their group
- Following U3A protocols on confidentiality and privacy
- Advising Manager Member Services, Health and Wellbeing support persons or Committee of Management of issues as they arise
- Being aware of health and welfare concerns that might affect their activity.
- Being familiar with evacuation and emergency procedures at the venue or space they are using.
- Managing and mitigating risks associated with their activity, particularly outdoor activities.
- Being aware of U3A Bendigo Policies, Procedures, Terms & Conditions, Copyright, and Grievance measures, and being able to access them via the U3A Bendigo website or the office.
- Being reliable, accountable, and committed to the aims of U3A Bendigo
- Always treating all members with respect.

U3A Bendigo supports and respects the rights of Leaders and Co-Leaders by providing:

- Comfortable and appropriate facilities
- Easily accessible reporting procedures, such as a variety of forms to assist with attendance, incident reporting and new and changed activity requests.
- Reimbursement of appropriate activity-associated expenses after gaining approval of Treasurer
- Opportunities at regular Leaders and Co-Leaders Meetings to give feedback on matters of concern.
- Access to Policies, Procedures, Handbooks and Instruction Manuals
- Assistance in their role as a Leader or Co-Leader

Leader/Co-Leaders are encouraged to contact the Manager Members Services for help needed to carry out their role by email to activities@u3abendigo.com or phone 0490 858 469.

ACTIVITIES' ADMINISTRATION

Venues & Accommodation

As a guide Rooms 1 and 2 at St Mary's in Kangaroo Flat is used for the smaller sized activities such as board games, and My Story. Some activities are held in Clubs and Pubs such as book clubs and Discussion groups. And some activities are held in private homes such as Music for Pleasure. St Mary's Hall and Quarry Hill Community Hall are used for activities that require more space. For example, the monthly Social Gathering, Leader/Co-Leader Meetings, New Member welcome, and other larger groups meet in St Mary's Hall. The music groups, Yoga, Theatre and the Art and Craft groups meet in Quarry Hill Community Hall. Table Tennis, and Walking Football

are held in appropriate venues for that activity. And there are some activities that are held outside such as pentanque, croquet and walking groups.

Refreshment making facilities are generally available at all inside venues. The kitchenette at St Marys is available Monday to Friday for members to access water, tea or coffee. The kitchen at Quarry Hill Hall is accessible at all times when there is an activity in process. Leaders hold keys to the cupboards for tea and coffee etc. U3A has sole access to the U3A office at St Mary's, which is open on Tuesday and Friday mornings.

Health and Wellbeing, Risk and Safety

Leaders/Co-Leaders are encouraged to contact the Wellbeing Team if they become aware of members who might like to have contact with the Team. All conversations remain confidential, and the member's privacy will be respected.

U3A Bendigo takes out personal accident insurance, which covers all Leaders/Co-Leaders and members in the event of an accident. See Appendix 1 for a summary of the insurance policy. Leaders/Co-Leaders should be aware of issues that may affect the safety of members. Any emerging or potentially dangerous situations should be immediately reported to the office or phone 0490 858 469. As prevention is better the cure, Leaders/Co-Leaders are asked to pay particular attention to unfixed floor coverings, damaged chairs, walkway obstructions, wet steps or paths, extension cables and moveable equipment. If any electrical equipment is found to be faulty, please contact the Technical Advisory Group Team.

Incident Report Forms can be downloaded from the website on the Policies & Forms page. Hard copies are kept in the Forms for Members tray by the photocopier in the kitchenette.

First aid kits are in kitchenettes and there is a defibrillator at St Marys and Quarry Hill Community Halls. While occasional training sessions are provided to Leaders/Co-Leaders on how to use the defibrillator, full instructions are given when the unit is operated. Fire extinguishers and a fire blankets are located at kitchenettes. And emergency evacuation plans are on walls.

Policies, Procedures, Forms & Supporting Documents

A range of policies, procedures, forms and supporting documents are available on our website. A relevant list of all policies, procedures, forms and supporting documents, will be made available each year. Leaders/Co-Leaders are encouraged to become familiar with these.

Security & Access

If your activity is held in the U3A rooms at St Mary's, as Leader/Co-Leader, you will be issued with a security code that allows you to gain access to the key box, which contains two keys one to open the main entrance door and the other to open Rooms 1 and 2. If another member takes over your duties, please inform the office, so we have an accurate record of those who know the code. Please note: the code is changed each January. Keys to Quarry Hill Community Hall are provided as required.

Locking Up

At the end of your activity, and if there is no other activity immediately following yours, make sure the air-conditioning and lights are switched off in the space you are using, and that the windows and doors to the rooms and office are closed and locked. Check no one is in the toilets before you leave. Ensure you lock the main entry door at St Marys before replacing the key in the key box.

The outer door of St Marys must be locked when the rooms are vacant, even if another group is using the rooms later in the day.

Comfort and Convenience

Whether held at the U3A rooms or elsewhere, if your activity requires furniture to be moved, ensure it is returned as found before leaving. Please don't lift heavy items on your own.

Offsite Activities

If your activity takes place at venues other than at St Mary's, or Quarry Hill Community Hall, or you would like to hold your activity at an offsite venue, please contact the office for advice, support or more information. Please contact the Leader Member Services/Office Manager before you approach any venue as U3A may already have an arrangement with that venue.

Outside Activities

If your group would like to move its activity away from your normal venue, or you would like to take your group on a trip, prior approval must be given by the Committee of Management to ensure your group is covered under our insurance policy. You will also need to ensure all members, who attend a venue away from your normal venue, are recorded on the attendance sheet.

Equipment & Technology

U3A Bendigo provides a range of information technology resources for Leaders/Co-Leaders and members. We can help Leaders/Co-Leaders and members develop their IT skills. Laptop computers are available for your use, or you may use your own, for making presentations, screening movies, playing music, etc. Large screen TVs with attached media players are in both rooms at St Mary's, and can be used for presenting CD, DVD and Blu-ray discs as well as photos, video and audio files saved to USB flash drives. A portable battery-powered wireless microphone public address system is kept in the office for use in the Hall or elsewhere.

Quarry Hill Community Hall has digital projectors and projector screens for use.

For help with preparing presentations, using equipment, or technical issues, please contact the Technology Advisory Group or the office.

Copyright

Leaders/Co-Leaders are reminded they need to be familiar with and abide with copyright laws. For further advice, contact the office.

Activity Membership

Financial members can enrol and attend any activity subject to the agreement of the relevant Leader/Co-Leader. Contact the office if you are unsure a member attending is financial.

Prospective or non-members can attend for a couple of times before deciding if they want to join **if** space is available in your activity.

Timetables

The Prospectus provides details of all activities available at the time of printing. Changes in day, time or venue of activities are advertised in the BUZZ. Leaders/Co-Leaders are asked to ensure information on any changes is given to the Manager Member Services as soon as possible, who will ensure U-MAS, the Prospectus, the BUZZ, Quarry Hill Community Hall and the St Mary's Room Schedule is updated as appropriate.

Record Keeping

A record of members attending your activity must be kept on the approved *Attendance Sheet* given to Leaders/Co-Leaders at the beginning of each year. This is primarily important for insurance purposes. Completed attendance sheets need to be returned to the office by 31 March, 30 June, 30 September and 31 December each year for record keeping and analysis which also

helps in future planning. Eg continual low attendance numbers may indicate declining interest, or need for seasonal delivery to accommodate grandparenting in school holidays or travelling.

The Attendance Sheets can be downloaded from the website and the Forms for Members tray in the kitchenette.

Name Badges

Please remind your group that they are expected to wear their name badges when attending any U3A activities. While the front of the name badge records the year of membership, member name and membership number, importantly, the back of the name badge records emergency contact details, which may be needed at any time. The office can print replacement name badges.

Please encourage your members to also include private information about health and medication on the inside of the folded badge details. This will only be available if medical assistance is required by an ambulance.

Fees & Payment

Annual membership fees for the following year are agreed by the membership at each annual general meeting and are levied to cover rental of the rooms for activities at St Mary's from 9:00 am until 5:00 pm on weekdays; the St Mary's Hall for Social Gatherings; Quarry Hill Community Hall for activities on Tuesday, Wednesday, Thursday and Friday and the cost of electricity, insurance, printing, supplies and technology. The fees do not normally cover the cost of offsite venues, such as the Eaglehawk Badminton and Table Tennis Centre. Gurri Wanyarra Aquatic Centre or other sporting venues. These costs are shared by the group participants. This may also apply to other offsite venues.

Annual fees are due each year on 1 January and are for the calendar year. Please ensure you are wearing a current year's name badge. If in doubt, contact the office

Expenses

Please discuss with Treasurer your needs for activity or course materials, gifts for non-member presenters, postage and stationery costs. To claim for minor expenses, up to \$50, Leaders/Co-Leaders should obtain an *Expense Claim Form* from the Forms for Members tray in the kitchenette. Receipts need to be submitted with the claim form.

Any predicted costs over \$50 may need to be approved by CoM, so protect yourself by submitting major or unusual expenses to the office for approval before outlaying your cash. Travel expenses should always be submitted for approval in advance. Leaders/Co-Leaders are reminded normal travel expenses to attend regular activities cannot be reimbursed. Some groups have offered to assist their Leader if they travel long distances to undertake their normal activity.

Kitchenettes

As well as cleaning supplies, cold and hot water, tea, coffee, sugar and milk are available for members' use and are kept in kitchenettes. Contact the office if supplies are low. Please ensure used cups and spoons are washed and that the kitchenettes are kept tidy. Adhere to any signage about things to turn on and off.

Office Use

Use of the office outside normal office hours is not encouraged but if you have a reason to access or use the office, please do not use or switch off the desktop computers as backups are automated and cannot be carried out if the computers are switched off. If you need to use the office photocopier for coloured copies, please arrange with the office during office hours.

Leaders/Co-Leaders needing to collect window keys housed on the keyboard behind the door in the office to open the windows in either room for ventilation, should ensure the windows are closed, locked and the key is returned to its correct hook before leaving the premises.

Photocopying

A black and white photocopier is available in the kitchenette for use by Leaders/Co-Leaders and members. Spare copying paper is kept in the cupboard under the photocopier. Please let the office know if there is an issue with the photocopier or if paper or toner need replenishment.

Taking Photos

Whilst members will have noted their acceptance to have photos taken on their enrolment form, please give a courtesy check each time you take a photo to be certain that they are happy to be photographed on that occasion.

Zoom Use

Leaders/Co-Leaders may conduct their activity online or partly online and in person using Zoom. Please contact the Zoom Coordinator via email to zoom@u3abendigo.com to submit a request to set up a Zoom meeting. For technical assistance, Leaders/Co-Leaders are also encouraged to contact the Zoom Coordinator or Technical Advisory Group

COMMUNICATION

Leader/Co-Leader Meetings

Each year we will hold the following meetings:

- One in late January to Kick Off the year where we will welcome new Leaders and Co-Leaders, and bring everyone up to date with matters that are important to running U3A and our Activities
- One in the middle of year, first to show our appreciation of your contribution to running the Activities of U3A and secondly to have a review of how our membership is engaging with what we have to offer.
- One in late August or early September with the purpose of planning how we propose to run Open Day which is the first Wednesday of October and to put forward ideas for what U3A Bendigo should or could offer in the following year.

Attendance at the first meeting in January is important and you are expected to attend. We would normally expect Leaders or Co-leaders or a member of a group in their absence to attend later meetings in the year. The CoM is committed to providing any support and assistance with any issues you are experiencing. Your feedback is welcome and valued. If you have any ideas or suggestions for improving Leaders/Co-Leader's Meetings, training or support, please let the Activities Team know.

Communicating with your Group Members

When joining U3A Bendigo, members are required to provide contact details on their application forms. These details are regarded as private and will be shared with others only with the member's permission. Leaders/Co-Leaders can log into U-MAS from the U3A Bendigo website: u3abendigo.com, select reports for your activity and access a list of members enrolled in your group. The details will allow you to contact your group members. Contact the office if you would like training on using U-MAS.

Contact details are strictly confidential. Leaders/Co-Leaders are asked to send emails to members using "bcc" or use the U-MAS email notification.

If for any reason you are unable to attend an activity, please inform your group members beforehand and if possible, arrange for the Co-Leader or another member of your group to deputise for you. Managing your activity can be made easier if you have a designated Co-Leader.

Communicating with the Member Services Team or Office Volunteers

Effective communication between Leaders/Co-Leaders and the Manager Member Services and the Office Volunteers is essential for the smooth running of U3A Bendigo. These people will take any issues you have to the Committee of Management if required. You are welcome to attend Committee of Management meetings as a visitor. Please advise a member of the Committee of Management if you would like to attend.

We welcome new ideas and any suggestions to improve the running of your group. Help is available if you need any equipment for your activity.

U3A BENDIGO MEMBERS' INSURANCE

Our policy covers all financial members and volunteers while they are undertaking activities organised by U3A Bendigo.

Policy Name: *Volunteers Personal Accident and Sickness*

The summary conditions apply to

- **Age Limitations** which determine the amount paid out for accidental death and all other benefits. For example, the benefits for those over 75 years old are reduced
- **Non-Medicare Medical Expenses:** Subject to the terms, conditions and exclusions of the policy. The benefit payable is less any recovery made from any private health insurance fund with respect to the expense. No benefit is payable in respect of the Medicare gap, being the difference between payment made by Medicare and the Medicare Benefits Schedule fee for the expense.
- **Claim Offsets:** There is no cover under this policy for any loss which is covered under any other insurance policy, health or medical scheme. However, the policy will pay the difference between what is payable under the other insurance policy.
- **Drugs and Alcohol:** The policy shall not apply if you are under the influence of alcohol, including having a blood alcohol content over the prescribed legal limit while driving, or being under the influence of any other drug unless it was prescribed by a doctor and taken in accordance with the doctor's advice.
- **Attendance Sheets:** Attendance sheets need to be completed and up to date. In the event of any injury or mishap, an Incident Report needs to be well documented and passed onto the U3A Bendigo office immediately and a copy sent to the Treasurer.
- **Trips Away:** Leaders are required to notify the Committee of Management of all intended travel outside normal activity, otherwise, insurance cover will be denied. This includes all proposed day or multi-day trips away as a member of a U3A Bendigo group.

POLICIES, PROCEDURES, FORMS & SUPPORTING DOCUMENTS

U3A Bendigo Policies

Copies of Policies, Procedures and Forms are available for download on the [U3A Bendigo website](#), hard copy forms are located in the U3A kitchenette document tray or by request to the office.

Please make sure you read all Policies and Procedures and that you can access them when required. For any concerns or questions, please contact the Office or a member of Committee of Management

Policies and Procedures

- Terms and Conditions and Code of Conduct
- Privacy
- Risk Management including Safety
- Bullying, Sexual Harassment, Anti-Discrimination
- Health and Wellbeing and Excessive Heat
- Walking group Policies

Forms

- Enrolment forms
- Incident report forms
- New activity forms
- Nomination and proxy forms

DATES TO REMEMBER IN 2023

Please enter these dates in your diary or calendar

Attendance Sheets should be left in the office by 30th April, 30 June, 30th September and end of the year.

The BUZZ newsletter deadline for contributions is the second Tuesday of each month.

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|---|---|
| On line enrolment opens on the first business day of the year | 2 nd January |
| Enrolment and activity selection assistance | from 16 th January |
| Social Gatherings | 4 th Wednesday of each month |
| Labour Day Holiday | Monday, 13 March |
| New Members Welcome | Wednesday, 22 March |
| Good Friday | Friday, 7 April |
| Easter Monday Holiday | Monday 10 April |
| ANZAC Day | Tuesday 25 April |
| Social Gathering & AGM | Wednesday, 26 April |
| King's Birthday Holiday | Monday, 12 June |
| Open Day | Wednesday, 4 October |
| End of year Concert | Wednesday, 22 November |

USEFUL CONTACTS

| Role | Name | Email | Phone |
|----------------|---------------------|--------------------------|--------------|
| President | Cheryl Hardie | president@u3abendigo.com | 0428 272 417 |
| Secretary | Sue Middleton | secretary@u3abendigo.com | 0408 624 743 |
| Treasurer | Mark King | treasurer@u3abendigo.com | 0407 974 322 |
| Wellbeing Team | Christine Haddrick | wellbeing@u3abendigo.com | 0408 731 821 |
| U3A Office Mgr | Ian Burdett | admin@u3abendigo.com | 0490 858 469 |
| Website, UMAS | Lyn Goodall | umasadmin@u3abendigo.com | 0418 587 102 |
| Facebook | Jo Burgess | jobiemurch6@gmail.com | 0410 582 629 |
| BUZZ Editor | Mary Goodall Tuohey | buzz@u3abendigo.com | 0407 565 967 |
| IT Help | Office Mgr | | |
| IT Help | UMAS help email to | umasadmin@u3abendigo.com | |