

# How the u3a works

## (Dorchester and Third Age Trust)

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## Introduction

This document provides an outline of how the Dorchester u3a operates and also a brief introduction to the Third Age Trust. More details can be found in the other documents listed below:

- Group Leader Checklists: A set of checklists to help Group Leaders perform their role.
- The Group Leader Reference: A description of the role together with advice and guidance.
- Dates and Rates: The current year's event dates, subscription charges and expense limits.
- Venues: information about meeting rooms being used by our groups.

"Dates and Rates" is included in every newsletter as well as being a web page. All other documents are available on the website for viewing, downloading and printing, or can be requested from Groups Coordinator as paper documents.

## Purpose

The purpose of Dorchester and District u3a is to provide lifelong learning through self-help interest groups covering topics and activities as chosen by our members. Our groups provide a wide range of opportunities for members explore new ideas, skills and activities together.

## Principles

The Dorchester u3a principles are the Principles of the Third Age Trust.

The u3a movement is non-religious and non-political and has three main principles:

### 1. The Third Age Principle

- Membership of a u3a is open to all in their third age, which is defined not by a particular age but by a period in life in which full time employment has ceased.
- Members promote the values of lifelong learning and the positive attributes of belonging to a u3a.
- Members should do all they can to ensure that people wanting to join a u3a can do so.

### 2. The Self-help Learning Principle

- Members form interest groups covering as wide a range of topics and activities as they desire; by the members, for the members.
- No qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards.
- There is no distinction between the learners and the teachers; they are all u3a members.

### 3. The Mutual Aid Principle

- Each u3a is a mutual aid organisation, operationally independent but a member of The Third Age Trust, which requires adherence to the guiding principles of the u3a movement.
- No payments are made to members for services rendered to any u3a.
- Each u3a is self-funded with membership subscriptions and costs kept as low as possible.
- Outside financial assistance should only be sought if it does not imperil the integrity of the u3a movement.

## Organisation

The Third Age Trust, u3a's national body, provides advice on structure and roles. As an affiliate of the Third Age Trust, Dorchester u3a must abide by its terms and conditions. Dorchester u3a organisation is based on this advice and guidance as well as its constitution (see Constitution page).

## Groups

We are organised primarily by interest group. Each of our activities and topics has a group organised by a group leader (or contact). The shape and size of a group depends on the type of activity. Groups may choose to have a deputy group leader and other roles where helpful. Any Dorchester u3a member may join a group as long as the group isn't full. The group leader decides on maximum numbers for the group and will keep a waiting list if full. Where we have a waiting list, the Groups Coordinator will take action to start a new group.

New groups are formed when there is interest from members in an activity or topic and there is a volunteer willing to take the group leader role.

The primary link between group leaders and the committee is via the Group Coordinator.

## Committee

We have a committee to help keep the u3a running effectively. The roles and names of committee members are show on the website contacts page and in the newsletter.

The committee is responsible for the overall governance, strategic direction, financial stability, administration and sustainability of Dorchester u3a, and upholding the u3a guiding principles.

The committee responsibility includes:

- Ensuring the u3a has maximum impact for its members.
- Making sure new members are welcomed and supported and understand the ethos and self-help nature of the organisation
- Establishing all possible methods to achieve the best level of communication possible between the committee and the members.
- Providing support to groups; initiating new groups where there is demand and a volunteer willing and able to be group leader.
- Deciding on the use of funds and ensuring financial transparency.
- Liaison with National and regional u3a organisations

The committee generally meets monthly.

## AGM

The Annual General Meeting is the one formal meeting of the year to which all members are invited. The purpose of the AGM is to:

- Keep members informed
- Give members a voice
- Enable committee elections to take place
- Enable acceptance of the annual report and accounts.

Any decision requiring a vote of members rather than committee members is covered by the AGM (or interim Special General Meeting). Any member may submit resolutions (proposed and seconded) for discussion at the AGM.

## Communications

Since members of Dorchester u3a have the full range of communications preferences, we use a variety of methods to achieve the best level of communication possible.

## Newsletter

The foundation of our member communications is a newsletter, published three times per year, printed and delivered to all members. As well as news of interest, event and group announcements, the newsletter contains the full list of groups, group leader contact information, the committee and their contact information. This ensures all members especially those who do not use the internet have a full set of contact information, including for G/Ls and committee members who prefer not to have telephone numbers on our website.

## **First Monday Meeting**

While this monthly meeting is a chance to listen to a talk, review the hobbies display and socialise with other members, it is also an opportunity to meet committee members, learn about group activities and hear announcements. About 40% of members attend at least one Monthly Meeting per year.

## **Members' Update email**

In between newsletters, we send out updates to all members who have provided us with an email address. The update email allows us to provide timely information, but we need to remember that not all members receive the update.

## **Website**

The Dorchester u3a website allows us to provide members with more information than can reasonably be published in the newsletter or Members' Update emails, as well providing availability of specific information being up to date. All groups are able to show current information in their own web page. Common "How To" questions are answered, and the vast majority of group leaders have an email address, telephone number or both on the website.

## **Group communications**

In keeping with every group being organised appropriate to its activity, groups communicate with their members however it works for the group. Many use email. Others use telephone or a mixture.

## **Group Leader meetings**

We hold group leader meetings three times per year to keep them up to date on guidance and resources available from the national u3a and to provide an opportunity for group leaders to share ideas and problems.

## **Annual General Meeting**

The AGM, outlined on our organisation page, triggers us to send out annual reports and accounts plus any papers supporting proposals and elections in order that members are able to review prior to the meeting.

## **Feedback and Input from Members**

The u3a is a self help organisation run entirely for the benefit of members and hence we rely on having good input and feedback from members. In most cases members will have an informal conversation or send an email message but more formal channels are also available.

## **Communications with the Committee**

To check which committee member to send feedback or answer questions, refer to the contact page, which has an overview of the topics they each cover.

A selection of committee members always attend the Monthly Meeting and even if the "right" committee member isn't there, one of the others will be happy to take input on their behalf.

If you would like to raise an item to be discussed in a committee meeting, please send this to the Secretary.

## **Communication with Group Leaders**

Groups have by their nature regular contact and discussions with their members. If you have a topic which is not related to a specific topic, then please contact the Group Coordinator.

## Policies and Procedures

Most of our policies derive from the terms of Membership of the Third Age Trust which can be found on the Trust website (Terms of Membership of the Third Age Trust - u3a-KMS-DOC-026).

### Financial Matters

All financial arrangements must be overseen by the Treasurer on behalf of the committee.

The rules and procedures for financial matters are as recommended by the Third Age Trust and are, in general, to ensure compliance with being a charity and u3a's insurance policies. (see <https://www.u3a.org.uk/advice/financial-matters/512-financial-matters-u3a-kms-doc-033> for detailed information)

### Venue Hire

Meeting rooms hired for group meetings and other events must be paid for through the u3a bank account.

### Discounts

We are not allowed to provide a discount or free place to any member. The value of any free places for an event should be shared amongst all participants to the event.

### Day Trips, Study Groups and Holidays

See Group Leader Reference for policy and procedures. Note that if we are about to run, or wish to run, more than 10 trips (longer than day trips) a year, then we are likely to need to comply with the Package Travel and Linked Travel Arrangements Regulations 2018, and should contact National Office for further advice.

### GDPR / data privacy

As Dorchester u3a, the Membership Secretary collects and holds personal needed for membership purposes including:

- A member's name.
- Postal address.
- Telephone number(s).
- Email address.
- Gift aid information.

This information is only shared as required for the u3a operation, for example all Group Leaders receive a current list of member names and telephone numbers in order to validate membership and for contact purposes.

In addition for analysis and planning, we hold information on which groups members join and attendance at First Monday meetings.

A specific group can decide to hold additional information to support its activities. This is, of course, as agreed by the group members.

Note that photographs constitute personal data and consent will need to be obtained for both taking and displaying photographs of the membership.

We have completed a legitimate interest assessment (LIA), which is held by the Secretary. The assessment sets out how Dorchester u3a meets the requirements of legitimate interest as a lawful basis for holding information.

Whenever we (including groups) wish to ask members for additional information, we need to consider what information we are asking members to provide and why. As long as we can substantiate the basis for gathering the information and members are aware of the reasons why the information is needed then this will meet the requirements of GDPR.

The full data protection and privacy policies can be found on our website or obtained from the Secretary.

The Third Age Trust provides guidance on GDPR compliance in its document: Data Protection - u3a-KMS-DOC-053.

## **Copyright compliance**

Dorchester u3a buys a CLA license each year running from 1st August to 31st July. This allows us to copy up to 5% or one chapter/article from eligible books, journals and magazines per licence year and per course or group. What is covered can be checked by entering an ISBN into the Check Permissions tool on the CLA website ([www.cla.co.uk](http://www.cla.co.uk)) and full terms and conditions are also available there. Please note, this license does not allow us to share copies of materials outside of the group or on our website because it is public-facing.

We must ensure proper accreditation of sources on any images, graphics or text, especially those on our website.

## **PRS License**

The Third Age Trust has a PPL licence for music use for u3as across all venues. This ensures that all recorded music used by u3as is licensed by PPL and eliminates the need to investigate whether the licences held by the venues (if any) are suitable to cover music used by u3as.

## Third Age Trust

The u3a is a UK-wide movement of locally-run groups of which Dorchester and District u3a is one. The Third Age Trust is the u3a national body which looks after all the u3as in the UK, providing educational and administrative support.

The Third Age Trust's mission is to:

- Facilitate the growth of the u3a movement.
- Provide support for management and learning in u3as.
- Raise the profile of the u3a movement.
- Promote the benefits of learning in later life through self-help learning.

The Third Age Trust provides us with news from around the u3a groups and of its own programmes in:

- The Third Age Matters magazine is published five times a year and posted direct to members' homes.
- The National u3a Newsletter: Sign up to receive this on the website on the website: <https://www.u3a.org.uk> (at the bottom of the page)
- Sources, the online educational journal of the u3a movement has stories from around the u3a. available at <https://sources.u3a.org.uk>
- The Third Age Trust Website <https://www.u3a.org.uk>
- u3a has a youtube channel available at: <https://www.youtube.com/user/theu3a>

The Third Age Trust website makes advice and guidance documents available for all aspects of setting up and running a u3a.

There are some 70 national subject advisers, whose role is to provide advice on both the setting up of a group in their particular speciality and the sustainability of ones already in existence. Each adviser has a contact page which often contains background and advice for the subject covered. These are available at: <https://www.u3a.org.uk/learning/subjects>

It is well worth exploring the Third Age Trust website. You do need to request a password to access much of the content. All members can have access.