

# Course Leaders/Presenters Handbook 2020



## Welcome & Introduction

Manning Valley U3A Inc. appreciates your vital role in helping the U3A to offer a range of courses/activities for its membership to participate in. Without your leadership contribution we would have nothing to offer. You are a volunteer and so are all the other course leaders/presenters, the Office Bearers and Management Committee members. We value our voluntary status. We hope you enjoy your role as a Course Leader/Presenter.

*Manning Valley U3A Inc. Management Committee*

**Manning Valley U3A Inc.**

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Please note that the contents of this handbook are derived from existing policies, documents and materials primarily found on our website. Direct any feedback to the Programs Director.

This version dated 09.01.2020  
 C Abbott Programs Director

## History & the Philosophy of U3A

### What are Universities of the Third Age?

Universities of the Third Age, or U3As as they are more often called are voluntary, non-profit organisations which aim to offer older people low-cost educational opportunities which operate in a pleasant, supportive social setting. There are no formal entry requirements, no examinations and no 'awards'. U3As are basically self-help groups built on the premise that collectively older people have the skills and knowledge to provide learning opportunities (education) for themselves. After all, 'experts' of all kinds in all fields eventually retire, so there should be no need to depend on paid tutors for the third age!

In fact, the word 'university' in the title is used in the broad, medieval sense of a community of scholars coming together to learn from each other. The principles of self-help and mutual support are the very cornerstones of the U3A movement.

Most of the groups in Australia are community based, but there are several, mainly in the capital cities, which do have an affiliation with and receive support from a local university.

### How and when did the U3A movement begin?

U3A (University of the Third Age) is a world-wide organisation. It began in France in 1968, when legislation was passed that required universities to provide more community education. In 1973 a highly-rated gerontology course was provided by Toulouse University for local retired people, a course which was extremely successful, and which led to the formation of what was to be the first U3A. This organisation was open to anyone over retirement age; no qualifications or examinations were required, and fees were kept to a minimum.

The idea spread rapidly throughout France and then to Belgium, Switzerland, Poland, Italy, Spain and across the Atlantic to Quebec and California. When U3A surfaced in Great Britain (in Cambridge), however, the 'model' was to undergo a significant change. Whereas in the French model there were strong ties to the universities, which decided upon, structured and presented most of the courses, in the British model these university ties were to disappear. In this system there was to be no distinction between the teacher and the taught – members would, as far as possible, be teachers as well as learners.

The late Dr. Peter Laslett (Cambridge University) was responsible for adapting the founding French university sponsored U3A into a community based model which has become known as the 'Cambridge Model' of U3A which is common to U3As in Australia. He was also responsible for defining the four 'ages of man' in his book *A Fresh Map of Life: The*

*Emergence of the Third Age.* Retirement offered an opportunity to catch up with a lot of activities there had not been time for in the first two stages of life.

This British model of U3A was the one introduced into Australia (Melbourne) in 1984. The first U3A in NSW was established in the Shoalhaven area. The U3A movement has since spread rapidly throughout Australia. The U3A movement has been identified through academic research as being the fastest-growing adult education movement in Australia.

### Our Genesis in the Manning

In May 1999 a public meeting was called, organised by the Manning Valley Neighbourhood Services Inc. to discover if there were enough interested people in the district to form a local U3A. The answer was a resounding “yes”. A steering committee was formed and work in the backroom began. By July the Committee was able to announce the success of their plans and the first ‘opening’ meeting declared that courses would begin at the start of Term 3 1999. The rest, as they say, is history. From its humble beginnings and initial enrolment of fewer than 80 members, Manning Valley U3A Inc. has emerged as a dynamic organisation of more than 500 members, large enough to be able to offer its members a wide range of activities but small enough to retain its ‘friendly’ feeling.

## 2019 - 2020 Office Bearers & Management Committee \*

President	Lina Ingram	6552 5080
Secretary, Programs & Newsletter Editor	Chris Abbott ***	0400 306 778 ++
Treasurer	Kerry Formann ***	0409 909 899
Membership Officer	contact Secretary/Asst Secretary	
Committee Support Officer & Refreshments	Ann Haydon ***	6552 2953
Assistant Secretary & Copyright Officer	Heather Abbott	0419 493 065
Assistant Treasurer	Barbara Fieldhouse	0458 531 932
Publicity Officer	Dawn Rankin	6552 3131
Welfare Officer	Robyn Neufeld	6553 8742

\*\*\* Retiring office bearers/committee members notified at the AGM 27.4.2020.

++ Your point of contact for all matters affecting you and the course/activity you are leading.





## Course Leader Profile

Name:

Member #:

Current course proposal:

1. Why are you or why do you want to be a course leader?
2. What do you enjoy or what do you think you will enjoy about this role?
3. How long have you been one?
4. Besides the current course, what other ones have you led previously?
5. Do you have any ideas for other courses you might like to lead?
6. Is there anything else you would like to share about yourself?
7. Please provide your contact details so that a draft of what will go in the newsletter can be provided for you to check:  
 Phone:  
 Email:  
 Other:

## Course Proposal

1. Prospective Course Leader/Presenter name: Member #:
2. Proposed course title:
3. Proposed course description:
4. Which term/s?
5. Which day?
6. For how long? # Weeks: # Hours:
7. Max number of participants (if any):
8. Any specific equipment requirements we may be able to help with:
9. Any additional information:

*Return your profile and proposal, to the Programs Director by email, post, by hand before the required time, usually mid-term of the term before you want to start your course.*

## Our Policies and Procedures

### **Our Code of Conduct**

(Authorised by the Manning Valley U3A Inc. Management Committee 21.6.2019)

#### *Introduction*

Manning Valley U3A Inc. is made up of a diverse range of members. It is organised and run by volunteers for the benefit of all its members. Members share their interests, knowledge and skills with other members as course leaders and course participants in a mutually supportive environment so that enjoyable educational and social activities occur.

*This code outlines the conduct expected of all members as follows:*

1. Respect and courtesy must be accorded to fellow members. Unsociable behaviour including bullying, harassment or discriminatory behaviour is not acceptable.

*Bullying* is being mean to someone over and over again. It occurs when someone or a group of people who have more power than you, repeatedly use words or actions to hurt you.

*Harassment* can be when a person is treated less favourably on the basis of certain personal characteristics, such as race, sex, marital status, age, disability, sexual orientation, gender identity or intersex status.

*Discrimination* occurs when someone is treated unfairly because they belong to a particular group of people or have a particular characteristic.

2. All members must respect the privacy of other members and confidential personal information which is disclosed to them.
3. Members enrol in courses which they choose based on the suitability of that course to meet their needs and interests. In doing so members commit themselves to regular attendance and positive participation.
4. Disruptive behaviour that disturbs others in any U3A class or activity is unacceptable.
5. In the interests of health and safety members must establish the appropriateness of their enrolment in courses especially those with physical components. Members are required to disclose any medical conditions or disabilities which may affect their enrolment.

6. Members must always be identifiable to course leaders and other members. This makes the wearing of their membership badge to all U3A classes or activities essential. Members must write inside their badge emergency contact details.
7. Members are responsible for advising course leaders about their absence.
8. Members are responsible for advising the course leader and the Membership Officer if they withdraw from a course.
9. Members who have particular concerns relating to the behaviour of other members which they cannot resolve satisfactorily themselves must inform the Secretary in writing if they wish to initiate a grievance procedure.
10. Members who do not comply with this code will be required to explain to the Membership Committee or its delegate why they should retain membership of the Manning Valley U3A Inc.

### ***Expectations of Course Leaders/Presenters***

(Authorised by the Manning Valley U3A Inc. Management Committee 21.6.2019)

1. All course leaders are expected to support the purposes of the U3A as outlined in the constitution, follow and uphold the Code of Conduct and other policy documents issued from time to time by the Management Committee.
2. Promote the benefits of being a U3A member.
3. Be organised and prepared to lead their class/activity.
4. Be aware of the needs of class members.
5. Give assistance and help appropriately to individual members who request it.
6. Respect the privacy of class members and any confidential personal information which is disclosed to them.
7. Ensure financial members only participate in class. Request members bring and wear their membership badge highlighting the need to do so to ensure compliance with insurance requirements.
8. Ensure attendance records are kept accurately to ensure compliance with insurance requirements.



9. Utilise resources in a careful and cost effective manner.
10. Adhere to the copyright laws and the U3A's policy on this.
11. Advise the Programs Officer and the venue if a cancellation of the space used is going to occur.
12. Provide feedback to the Management Committee via the Programs officer about their course.
13. Obtain pre-approval before incurring any expenditure from a member of the U3A executive.
14. Participate in the course leaders/presenters & committee meeting in June &/or on other occasions requested to do so by the Management Committee.
15. Provide advice about future course offerings in a timely manner, usually mid-term of the term before a course is offered. Provide a clear and succinct course outline for publication. Where possible provide items and photos for possible publication.
16. To bring to the committee's attention through the Programs Officer any matters concerning, for example, their role, class operation, class members, venues.

### **Grievance Procedure**

(Authorised by the Manning Valley U3A Inc. Management Committee 21.6.2019)

To be read in conjunction with the Constitution (2016), revised Application for Membership/Enrolment (Term 3 2019 and following), Our Code of Conduct (2019), Expectations of Course Leaders/Presenters (2019) and Grievance Procedure flow chart (see below).

The Management Committee of an association is responsible for the administration of the association, including handling internal disputes between members (in their capacity as members), as well as disputes between members and the association.

'Procedural Fairness' needs to be maintained for all parties especially in terms of maintaining a reasonable time frame, giving parties adequate notice, responding to parties involved, providing opportunities for parties to put their case and avoiding bias.

In the first instance the aggrieved party must address the matter causing the grievance directly to the person causing the grievance. This may be done with a support person. This is best done when an issue causing concern or potential grievance is first identified. If this is resolved satisfactorily that is an end to the matter.

If this does not work satisfactorily, that is, in resolving the matter, then the grievance must be referred in writing to the Secretary, Manning Valley U3A Inc. The matter will be noted and discussed at a Management Committee meeting and may be passed on to a Grievance sub-committee.

This sub-committee will consist of at least three members one of whom will be from the Management Committee. The Management Committee member will act as the chairperson. If there is a conflict of interest, then another Management Committee member must be selected. Members appointed must be independent of the members involved with the grievance.

When a grievance is received and through the entire process details of the grievance must remain with the Grievance sub-committee. No information is to be passed on to a third party, except the Management Committee, without permission. Respect for the privacy of the participants and the confidentiality of the process is essential.

The Grievance sub-committee will meet as soon as possible but no later than fourteen days after the receipt of the grievance in writing to the Secretary.

The Grievance sub-committee will gather relevant information together and speak with both parties about the issues raised.

It will attempt to bring the parties together to resolve the grievance. If this is resolved satisfactorily that is an end to the matter.

When a dispute is not resolved by the Management Committee in thirty days the matter will be referred to a CJC.

A dispute between a member and another member (in their capacity as members) of the association, or a dispute between a member or members and the association, are to be referred to a Community Justice Centre for mediation under the *Community Justice Centres Act 1983*. <http://www.cjc.justice.nsw.gov.au/>

### *Grievance Procedure flow chart*

1. The individual approaches the person with whom they have a grievance. If this is resolved, then the matter is finalised



2. If the matter is not finalised, then the grievance is presented to the Secretary in writing. The grievance is discussed by the Management Committee and may be delegated to a Grievance sub-committee



3. Grievance sub-committee may be convened to formulate strategy to resolve this



4. Resolution attempted



5. Success: resolution achieved



Failure: resolution not achieved



Referred to a Community Justice Centre for resolution in accordance with the Community Justice Centre Act 1983



Resolution achieved?

### ***Authorised Expenditure and Reimbursement Policy***

(Authorised by the Manning Valley U3A Inc. Management Committee 3.5.19)

Volunteers may on occasion be required to pay expenses as a result of their involvement with Manning Valley U3A Inc. out of their own pockets. Under certain circumstances, as outlined in this policy, these expenses should be reimbursed by the Manning Valley U3A Inc. Where these are projected by course leaders or other members as necessary to conduct a course, for example, printing of materials, they must be pre-approved for expenditure and in this case, reimbursement will not be required.

The purpose of this policy is to spell out under what circumstances reimbursement of volunteers may occur on behalf of the Manning Valley U3A Inc. , and the process for doing so.

This policy relates to volunteers acting on authorized Manning Valley U3A Inc. business.

Manning Valley U3A Inc. will reimburse its volunteer Management Committee members expenses incurred by them on behalf of the Manning Valley U3A Inc. so long as these are reasonable. The receipts or other appropriate documentation must be produced and given to the Treasurer who will complete the cheque requisition form and write the cheque. A motion supporting payment will be moved at the next Management Committee meeting.

Manning Valley U3A Inc. will reimburse its volunteer members expenses incurred by them on behalf of the Manning Valley U3A Inc. so long as these have been *authorised* by either the President, Secretary or Treasurer *before* they are incurred. They must be reasonable. The receipts or other appropriate documentation must be produced and given to the Treasurer who will complete the cheque requisition form and write the cheque. Where appropriate a motion supporting payment will be moved at the next Management Committee meeting.

The Manning Valley U3A Inc. will not reimburse volunteers for:

- Unauthorised expenses
- Expenses claimed by volunteers as a tax deduction
- Expenses normally recoverable from a third party
- Expenses that are not incurred for specific Manning Valley U3A business purposes
- Late payment interest on credit cards
- Parking, traffic, or other fines and penalties

Any volunteer expenses related to travel, accommodation, meals or other must have been authorised before they are incurred by the Manning Valley U3A Inc. Management Committee.

### ***Refund Policy***

(Authorised by the Manning Valley U3A Inc. Management Committee 13.12.2019)

The policy refers to refunds which members may be entitled to arising from their participation in Manning Valley U3A Inc. courses and activities. It must be read in conjunction with the Manning Valley U3A Inc. Authorised Expenditure and Reimbursement Policy (Authorised by the Manning Valley U3A Inc. Management Committee 3.5.2019).

The following will apply:

1. The annual membership fee is not refundable.
2. Enrolment fees will be refunded if a course/activity is cancelled by the Manning Valley U3A Inc. Office Bearers or Management Committee.
3. In other circumstances the course/activity enrolment fee(s) are refundable only at the discretion of the Office Bearers (President, Secretary, Treasurer acting in committee).

## Venues

Manning Valley U3A Inc. uses a variety of venues to conduct courses. Nearly all of them are rented by us for the days, times, weeks that courses are timetabled. It is important that if you do not use a venue at some time then the Programs Director needs to be informed so that we do not pay unnecessary rent.

Our regular course venues are:

Manning Uniting Church Albert St Taree

Chatham Uniting Church Chatham Ave Taree

Church of Christ Victoria St Taree

Taree Guides Hall Douglas St Taree

Manning River Sailing Club River St Taree

Club Taree Wingham Rd Taree

Manning Regional Art Gallery Macquarie St Taree

and from time to time others are used where necessary.

## Safety Issues

When necessary the following documents need to be completed. They are important for insurance purposes.

**Hazard Report** (Course leader/s or Management Committee member to complete)

If you identify a hazard or one is reported to you, please complete and return to the person identified below:

Venue name:

Date & time:

Where is the hazard?

What is the hazard?

What is the risk?

Rate the risk using the following scale as a guide. Circle one below:



1. Extreme risk; action required immediately to rectify hazard
2. High risk; action required quickly
3. Medium risk; action required over the next week
4. Low risk; action required over the next few weeks
5. Minimal risk; action required over the next month

How likely is it to cause harm/injury?

What action did you take?

Reported by:

Date:

Refer to the Secretary Manning Valley U3A Phone 0400 306 778 or post to PO Box 436 Taree 2430  
or email [secretary@manningvalley.u3anet.org.au](mailto:secretary@manningvalley.u3anet.org.au)

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Management Committee action taken:

Date:

## Accident/Incident Report



The Secretary, Manning Valley U3A Inc., PO Box 436 Taree NSW 2430  
 Email: [secretary@manningvalley.u3anet.org.au](mailto:secretary@manningvalley.u3anet.org.au) ABN 29 612 623 669  
 Web: <http://manningvalley.u3anet.org.au> INC 3409944  
**'LEARNING FOR LIFE' AND CELEBRATING 20 YEARS IN 2019**



### ACCIDENT / INCIDENT REPORT

<p><i>This report must be completed when any accident or incident involving a person has occurred in relation to any U3A course or activity, whether on U3A rented premises or elsewhere, and irrespective of whether an injury or illness is apparent as a result. The report must include sufficient details of the accident or incident and the surrounding circumstances. The report can be prepared by the person involved or another person who knows the facts (such as a witness to the event) and should be completed as soon as possible after the event. This report will provide Manning Valley U3A with a record of the event in the case of any insurance claim arising from the accident or incident. Please forward the completed report to The Secretary.</i></p>
Date and time of accident/incident:
Name of person involved (including contact details if known):
Location of accident/incident:
Describe as fully as possible the nature of the accident/incident:
Describe any injury/illness as a result of the accident/incident:
What medical or other assistance, if any, was given following the accident/incident:
If possible, indicate the names and contact details of at least two people who witnessed the accident/incident:
Name of the person preparing this report:
Date of this report:

*If space is insufficient for any entry, please use the back of the sheet.*

## Planning

To offer a course you need to complete a profile and a course proposal. These are due in the middle of each term prior to the term in which you are offering your course. Where courses are continuations without significant change the proposal may be given orally or by email.

## Copying and Copyright

Copyright law protects the intellectual property of creators (writers, poets, film makers, designers etc etc) whilst balancing their rights against the users, particularly educational institutions. U3A is recognised as an educational institution.

If you are in any doubt about the copying you are undertaking, please check with the Copyright Officer to ensure we are compliant with the legal requirements and our licence arrangements. Before copying is undertaken the first copy must be carefully annotated with the details of the source – author, title, date and place of publication, and the number of the pages actually copied, for example, pp.24–35 of the original.

If you are a new course leader or one who has not been involved for a while, you will be asked to return a survey (proforma will be provided) of a sample of the materials you envisage using. This is to support you in complying with copyright regulations and to make sure that our licenses support your needs.

From time to time, say every three years (at the discretion of the Management Committee), this survey will be repeated with all our leaders to make sure that changes and adjustments to resources you have made are compliant.

Copying may be done using the U3A machine for small quantities. Consult the Programs Director to arrange this. If larger quantities are required these will be done by U3A's outside printer. Before any copying is done it must be approved by the Programs Director and the Treasurer or Secretary or President.

*All copies remain the property of the U3A. All copies after use, except those of a single use nature must be retained by the course leader/presenter and returned to the U3A for storage.*

## Keys and Equipment

If you are issued with any key/s and/or equipment, please keep them safe and secure. Manning Valley U3A Inc. has very limited equipment for use. Check with the Programs Director about what you may need. You also need to be mindful of the equipment in venues we use. Any loss or damage caused by you must be rectified by you. Keys and/or equipment must be returned to the Secretary when they are no longer required.

## Conducting your class/activity

How you conduct your class is up to you. It needs to be consistent with Our Code of Conduct, Expectations of Course leaders, our policies and the approved course proposal. Please ensure you respect the privacy and confidentiality of participants' information. Ensure that behaviour is appropriate for the course/activity. Where any 'problem'/'issue'/'concern' arises please discuss it with the Programs Director. See *Becoming a Course leader/Presenter* above. Please remind members to wear their badge and to complete the contact details inside it. As part of the feedback to the rest of the Manning Valley U3A Inc. it is useful to send some photographs to the Newsletter Editor for use in the newsletter.

## Attendance records

This information is important, and we need to maintain accurate records of who does and does not participate in the course.

Rolls are issued as accurate based on completed enrolments by the Membership Officer. Additional names may be added by the Membership Officer either in writing by them or by other communication with you. If other people turn up who are not on the roll, you need to find out why they are there. We do have a practice of permitting a person to attend *one* course class to sample or visit the class. If this is in the first week or two of class, then they may seek a special late enrolment. If it is after this time, then they must be advised to join in the next term.

It is not your role to enrol members in your course. All matters regarding enrolment must be referred to the Members Officer and/or Secretary.

Those present need to 'sign on'. Where you are contacted by a course member with an apology this should be noted. If they are just absent leave the roll blank. Members who do not attend regularly may be contacted to find out if there is a 'problem' or 'issue' affecting their participation. Rolls must be returned to the Membership Officer at the conclusion of the term.

## Evaluation

Simple evaluation of how the course/activity is going needs to be undertaken.

This can be done informally or more formally, orally or through a written survey. A simple device is to use a PMI. Ask participants to identify the 'P' (positives/pluses about it) first, then the 'M' (minuses/negatives about it) and finally the 'I' (Interesting ideas/responses/thoughts/feelings about it). It is important to obtain the positive responses first as our natural first inclination is to be critical and negative.

Of course, simple recognition of course members' participation, attendance and enjoyment can inform you about how the course/activity is going.

Course participants' feedback can be useful in shaping how the course continues to run both in the present and in the future.

The Program Director needs to be advised about this.

## **Course Leaders/Presenters meeting with Management Committee**

One 'formal' meeting is usually held midyear. However, informal ones will occur frequently as a result of phone calls, email communication and visits to classes via the Programs Director and/or other members of the Management Committee. Course leaders/presenters should not hesitate to discuss matters concerning them with the Programs Director at the earliest possible time. The Programs Director will meet with new course leaders/presenters before they commence their class.

## **Agreement**

In receiving and reading this document you acknowledge the important role you are fulfilling as a Manning Valley U3A Inc. course leader/presenter. You appreciate that your role has responsibility for maintaining the 'good' name of the Manning Valley U3A Inc. You understand that whatever you do is governed by the codes, expectations and policies of the Manning Valley U3A Inc.

***Thank you for your participation as a Course Leader/Presenter.  
You are providing an invaluable service to our U3A.  
The Office Bearers and Management Committee appreciate  
your efforts, time and leadership.***

### *Member Information and Privacy Protection*

Manning Valley U3A Inc. collects personal information from members for organisational, communication, emergency and insurance purposes only. This information is held confidentially and will not be provided to any third party individuals or organisations without the consent of the member.